

Land grabs for biofuels driven by EU biofuels policies



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By: Carlo Hamelinck

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Summary

In recent years, several organisations have expressed their concern that the demand for feedstock for biofuels in the EU would cause land grabbing – large scale land acquisitions with negative socio-economic impacts – in countries all over the world.

Although figures about land grabbing are playing a prominent role in a heated debate, the evidence for this concern has hardly been quantified.

In this report, we assess claims about land grabbing, based on the top 50 land deals available in a best informed global database about land deals: the Land Matrix of the International Land Coalition. This assessment leads to the conclusion that the acreage of land possibly subject to land grabbing caused by EU biofuels demand is far less than often presented in the debate. At best, only 0.5% of all deals in the Land Matrix concern land grabs for EU biofuels.

Cross check on the land matrix

In this study, we cross-checked a substantial share of entries in the Land Matrix, which is a database developed by the international Land Coalition. It is one of the major data sources on land deals around the world. In this report, the Land Matrix has been thoroughly analysed to understand:

- How many land deals have there been in the last decade?
- How many of these deals could classify as land grabs?
- To what extent can these deals be linked to biofuels production?
- To what extent have EU biofuels policies stimulated deals or grabs?

In March 2013, the Land Matrix contained 617 agricultural deals with a total of 38.3 Mha. Accompanying studies and the website state that the deals are cross-referenced, i.e. they have been mentioned by more than one source.

Of these 617 deals, we assessed 66 deals, which sum up to 25.8 Mha, or 67% of the total acreage in the database. This includes the 50 largest deals around the world, as well as the 5 largest deals given per sub-region in the Land Matrix. We checked these deals by collecting all possible and available information about these deals on the internet and sometimes from private investigation, by checking information with networks within the respective countries.

We could only confirm land deals for 9.0 Mha of the assessed acreage, or 35%. This means that in the top-50 sample, the majority of the entries, 16.8 Mha, are incorrect. Many entries in the Land Matrix were based on plans or ambitions that never materialised in deals; on a few occasions, deals were cancelled at the last moment under public pressure. There are even several very large entries

based on Indian government plans to develop wasteland with smallholders – not situations where local farmers lose access to land.

For the remaining 12.5 Mha of entries in the database that we did not cross-check, it is likely that a large fraction also does not constitute land deals, although we assume that they are usually more correct than the top 50 of entries.

The link with biofuels is established on the basis of the crops that are claimed to be involved. Some crops are only produced for biofuels (e.g. jatropha), whereas other crops are never produced for biofuels (e.g. rice); for many crops the application can be food or fuel and we have assumed ranges.

Within the confirmed land deals, the acreage related to biofuels ranges between 0.5 and 4.9 Mha. The acreage related to biofuels in the not-assessed entries could range between 0.9 and 2.7 Mha, if all entries are correct, which brings the total to 1.4 to 7.6 Mha. The higher range represents the situation where all new switch crops would be dedicated to biofuels. As biofuels play a relatively small role in the application of these crops, the lower range is much more realistic than the higher range.

The biofuels deals may have been partly motivated by the EU market prospects. We estimate that maximally 10% of the biofuels projects outside the EU have been developed with an interesting future European market in mind. This is a rough estimate, based on the current and near future role of the EU in the world biofuels market (about 20%), which is and will be largely based on EU feedstock (currently 75%) with most of the third country supply already firmly established. We don't know if the EU attraction in reality has played a larger or smaller role for land grabs around the world, compared to other biofuels markets.

This would imply that the EU biofuels policy could have motivated between 0.05 and 0.49 Mha of the confirmed deals and 0.09 to 0.27 Mha of deals in the not-assessed entries.

It is nearly impossible to judge whether land has been grabbed following the definitions of the Tirana declaration. Very often there is some level of concern around land deals. Sometimes, these are specific to the project, echoed by multiple stakeholders. In other cases, concerns are generic and not at all related to a specific project, but rather to previous regional negative experience with land deals.

For all the confirmed land deals related to biofuels, we found that between 0 and 1.5 Mha concern either land grabs or have otherwise strong concerns. If *all* the not-assessed entries would be true deals and if they would *all* constitute land grabs, this would imply an additional 0.9 and 2.6 Mha of biofuels induced land grabs. This means that the absolute maximum of biofuels land grabs would amount to 0.9 to 4.1 Mha. However, based on extrapolation of the findings of the top-50 assessment, we estimate that, in reality, altogether a maximum of 1.8 Mha of land has been grabbed for biofuels. EU biofuels policies and the alluring market may have been responsible for maximally 180 thousand hectares of land grabs.

However, we do think that with the introduction of voluntary schemes in the frame of the Renewable Energy Directive, new biofuels projects developed for the EU market are giving much more attention to socio-economic aspects. Just as important is that several developing countries that were taken by surprise in the land rush period are now developing better legislative and regulatory frameworks to deal with this increased interest for land. In these countries biofuels are even an important leverage to improve land governance at large as well as to improve the agricultural sector.

There are several well-known examples of land deals related to biofuels that have gone sour, with strong negative impacts on local communities. These would justify a separate study. Detailed lessons should be drawn for the development of agricultural legislation and regulatory frameworks in developing countries, and the EU could play a role in assisting and supporting this process.

Several NGOs, most notably Oxfam Novib and Action Aid, have voiced strong concerns about land grabbing caused by biofuels. They use amongst others initial analysis by the International Land Coalition and its Land Matrix in building their political argumentation against (EU) biofuels. Action Aid claims that "it is estimated that biofuels have been involved in at least 50 million hectares being grabbed from rural communities." This is 28 times (!) our findings of about 1.8 Mha. The total extent of land deals that can maximally be connected to the EU biofuels policy in past and until 2020 is probably another ten times smaller.

Even so, it is of concern that several scientists are starting to upgrade the ILC "raw data" to scientific facts in peer-reviewed articles without decent scrutiny.

All in all, the Land Matrix is an important first step in bringing transparency in agricultural land deals around the world. We applaud this initiative and hope that it will bring ever better data to the international policy debate on agricultural land deals.

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1 Introduction

During the last few years, several concerned civil society organisations have linked large scale farmland grabs in developing countries, to the increased demand for biofuels [ILC 2012; Pisces 2011; Grain 2012; ActionAid 2012]. UN Special Rapporteur on the right to food, Olivier De Schutter, allegedly stated that “biofuel crops often lead to land-grabbing”. Recently, Mr. De Schutter stated that “6m hectares in Africa have already been taken over by EU companies for biofuels between 2009 and 2013” [De Schutter 2013].

According to the World Bank, the 2007–08 boom in food prices and the subsequent period of relatively high and volatile prices, together with the reduced attractiveness of other assets due to the financial crisis, sparked global interest in acquiring farmland [World Bank 2011]. In the same period, the global interest in biofuels was increasing and several investors concluded that Africa would be an interesting continent to grow feedstock for the luring biofuels market.

The comprehensive global study about land deals by ILC [2012] concludes that from 2000 to 2010, worldwide about 71 million hectares of cross-referenced¹ land deals were closed. The ILC study is based on their “Land Matrix”, a database that includes deals reported as approved or under negotiation. The study concludes that 73% of the cross-referenced deals are for agricultural production, of which three-quarters are for biofuels. In other words, they conclude that over 50% of global land deals are for biofuels (comprising 40% of the hectares where the crop is known).

ILC suggests that the rate of acquisitions remained low until 2005, where after it accelerated greatly, peaking in 2009 and slowing down somewhat in 2010. The surge of 2005–2009 can be related to the food price crisis and a range of factors that triggered new investor interest in land, including biofuels.

The ILC study stresses the risks for negative impacts from land deals, especially in developing countries, resulting in the loss of access to land, water and other natural resources by local communities, and eventually leading to poverty and hunger. The phenomenon of land deals with negative socio-economic impacts is generally called land-grabbing.

Information about the origin of EU consumed biofuels (in terms of countries and feedstock), as established in, for example, our reports on biofuels sustainability for the European Commission [Ecofys 2011 and 2013] cannot be used to understand the relation between land-grabbing and the

¹ The Land Matrix is a database of large-scale land-based investments, that include transactions that entail a transfer of rights to use, control, or own land through sale, lease, or concession; Imply a conversion from land used by smallholders, or for important environmental functions, to large-scale commercial use; Are 200 hectares or larger. The database contains two sets of data: “reported” (from published research reports and media reports and government registers) and “cross-referenced” (deals that are referenced from multiple sources and triangulated for reliability with other information sources, and, in-country partners in some cases) The database and its details can be accessed online at <http://landportal.info/landmatrix>



EU biofuels demand in 2009-2010². The lead time between the moment of land deals and the production of biofuels is at least 3-5 years for some crops (jatropha, sugar cane) and 7-9 years for others (palm oil). So, starting from the EU consumption in 2010, we would have to assess land deals in 2005-2007. And any land-grabs occurring in 2010, if even slightly stimulated by the projected future EU biofuels demand would not be covered by such an analysis.

Therefore, this report concentrates on land deals since 2000 to find out their possible relation with the EU demand for biofuels and to understand to what extent the demand for biofuels in the EU causes land-grabbing.

² ActionAid [2012] expressed their concern about the scope of the assessment on land-use rights in our 2011 report for the European Commission. A focus on 2010 biofuels consumption, would not give any insights in any land grabbing practices resulting from the projected demand for biofuels created by the Renewable Energy Directive.

2 Assessment of land deals

2.1 The challenge

It is impossible to obtain definitive data on the scale of land-grabs especially because the definition of what might be considered a land-grab can vary significantly [Pearce 2012]. Whether or not a transaction can be classified as land-grab depends upon the context. In most instances, land allocations do not violate domestic laws as the majority of large-scale land leases involve state-owned land, which may be leased to tenants. Pangea [2011] summarises that if the community has not been consulted properly and people lose resources that have supported their livelihoods for generations, without adequate compensation, then this could be considered a land-grab.

There are some international guidelines for compensation and livelihood-rehabilitation (IFC) and in many developing countries there is national legislation that details out the compensation methodology. Still, even if such guidelines and legislation are followed, the compensation may not be valued as being adequate. Furthermore, discontent can exist if expectations with regard to local socio-economic developments are not met (employment, infrastructure, social services, improved agricultural practices). For example, in Tanzania several biofuel feedstock investments failed and projects were abandoned in 2009-2011 [Pisces 2011; ActionAid 2012] before compensation was properly completed, or where the long term benefits from the investment did not materialise: people lost access to land but did not get employment in return. This illustrates that rules and guidelines are not sufficient, but that enforcement and grievance systems must also be in place, with the ultimate consequence that deals could be reversed if agreements are broken. It also illustrates that there can be a time lag between the land deal and the discontent. Land deals that are in principle appropriate at the start can be perceived as grabs years later.

Pearce [2012] further states that many land deals will occur in the utmost secrecy, and only come to light when large projects are implemented, or never at all. However, if the land deal (in 2009/2010) is intended for the (future) production of biofuels for the EU market, it would come to light quickly, as EU rules require the origin of feedstock to be certified. So, this problem seems less relevant for biofuels for the EU market. However, as remarked in the introduction, there is a significant time lag between the closing of land deals and the production of crops / biofuels. Some of those biofuels, especially in the case of land grabs, may never be exported to the EU, even if this was the initial intention.

There are many media reports on land deals with negative consequences. In reality, not all those deals actually took place. Moreover, while there are many media reports on land deals that have gone sour, the media barely cover deals with positive results.

As can be concluded from the above, it is very difficult to put an absolute distinction between good and bad land deals. The topic is multi-dimensional in issues, timing and responsibility.

Although the extensive study by the ILC and the underlying Land Matrix database does not distinguish between good and bad land deals, it could be a good starting point for further research. The 2012 ILC report mentions that 203 Mha of land deals are included in the Land Matrix and that 71 Mha had been “triangulated” and “cross-referenced”. When we analysed the Land Matrix for the first time in August 2012, it contained 48.8 Mha of land deals, of which 40.0 Mha were on agriculture. While the website still mentions that it contains “documented 924 deals since the year 2000, mounting to 48,829,193 ha of land”, currently (March 2013), the Land Matrix database contains 46.9 Mha of land deals, of which 38.2 Mha were on agriculture.

We have used the Land Matrix as a basic source for analysis. To understand the possible relation between the EU demand for biofuels and land grabs, we analysed the top 50 largest entries in the Land Matrix, and some more to establish:

- Which of the land deals classify as land grabs;
- Which of those land deals were aimed at biofuel production;
- What the link is with the EU biofuels demand.

2.2 Shortcomings of the Land Matrix

It must be noted that the Land Matrix database contains several serious flaws, which could be natural to this first attempt of reporting all the land deals in the world, but which should be corrected before the database becomes really useful. The ILC Land Portal website, hosting the Land Matrix, mentions that the current dataset does not differentiate between deals that are under negotiation, completed or failed. A policy brief by IIED [2012] stresses that the data must be treated with caution. The Land Matrix is based on reports from the media and NGOs which both often overestimate scale:

- A reported 10 million hectare deal in Congo, for example, is in reality closer to 80,000 hectares [IIED 2012];
- Of a reported 2.8 million hectare deal in the Democratic Republic of the Congo, only a lease for 100,000 hectares has been verified [IIED 2012];
- An 800 kha deal in Mato Grosso do Sul in Brazil could not in any way be verified. Official statistics only show that the cane acreage increased from 310 kha in 2008/2009 to 650 kha in 2012/2013;
- A 490 kha deal in the State of São Paulo actually refers to 12,000 existing properties of mostly sugarcane;
- A 2Mha Jatropha deal in India, seems to be based on nothing more than the government’s biodiesel ambitions, while a number of similar deals of varying but large acreage refer to the same source;
- Some of the largest agricultural deals in South East Asia are in fact forestry concessions (a seemingly large 2.39 Mha papaya deal in Indonesia being in fact a forest concession of 760kha established for pulpwood).

Others comment that 6.4 Mha in the Land Matrix top-10 of land deals have never come to fruition. The database contains many duplicate entries and unverifiable entries [Rural Modernity 2012].

Many ‘deals’ references given in the Land Matrix database do not correspond to specific deals. Often, the areas quoted are mere stated objectives or potentials, or large multi-stakeholder government

programmes. Many sources are reports or articles that cover large, multi-deal projects, countries or regions, thus very likely leading to overlap between sources and deals mentioned in the Land Matrix database. In many cases, the references given, do not allow to come to the large areas claimed to be affected by the deals. Based on our analysis of the top 50 entries, we propose a few suggestions for improving the database:

- Check that the links to references are not broken (in particular all the references to the blog entries of the IDLC website are broken, which makes many claims untraceable);
- Make the distinction between 'potential deals' and 'actual (closed) deals';
- Make sure that the reported deals cover specific deals or projects, but not a large group of projects over a large region (which typically makes it difficult to distinguish which parts cause concerns);
- Where possible make the distinction between large 'main deals' (for example government concessions) and sub-deals (actual projects leading to an activity on the land);
- Show if and how a source has been triangulated.

2.3 Analysis

The database currently contains 617 entries on agriculture, representing a total of 38.3 Mha. It is impossible in the frame of the present project to analyse each entry. We have attempted to obtain more information on the top-50 of agricultural land entries (and some more) to understand whether they constitute real deals, what is (are) the feedstock(s), and if there are any reported concerns.

The methodology for and results from the assessment of individual entries are given in Annex 1. The results are summarised in Table 1. In Figure 1, a visual insight is given on the role of biofuels in global land deals.

Table 1. Analysis of the ILC Land Matrix. All results in Mha. For detailed methodology see Annex 1. The minimum area allocated to biofuels is based on those crops that are being uniquely developed for biofuels (jatropha and a few others). The maximum area allocated to biofuels is the area for all switch crops, while accounting for co-products (e.g. maximally 33% of soybean area is used for biodiesel). In reality only a small share of switch crops is being used for biofuels. In the case of unknown crops, switch crops are assumed that could be used anywhere between 0% and 100% for biofuels. Furthermore, this table shows crops for all markets, not limited to EU destination.

Land Matrix total		38.3			
Assessed	25.8	For biofuels		Not for biofuels	
		Minimum	Maximum	Minimum	Maximum
Confirmed	9.0	0.53	4.9	4.1	8.5
<i>Land grab</i>		0	1.3	1.8	3.1
<i>Strong concerns</i>		0	0.16	0.22	0.38
<i>Generic concerns</i>		0.07	0.89	0.59	1.4
<i>Small concerns</i>		0	0.77	0.31	1.1
<i>No concerns</i>		0.45	1.8	1.1	2.5
No deal	16.8	-	-	-	-
Not assessed	12.5	0.92	2.7	9.9	11.6

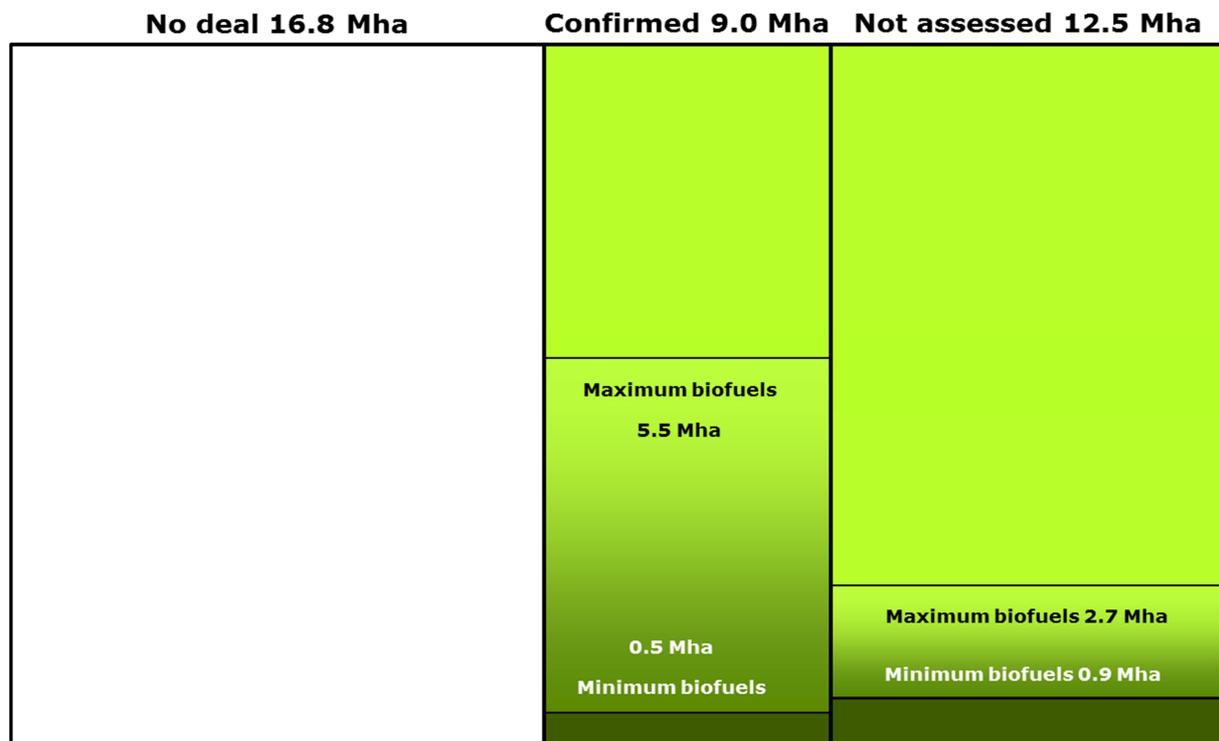


Figure 1. Analysis of the ILC Land Matrix. For detailed results and methodological notes, see Table 1. The upper boundaries for biofuels should be seen as absolute maximum, if all switch crop acreage acquired after 2000 would have been dedicated to biofuels. The real area developed for biofuels is probably much closer to the lower boundary.

2.3.1 Deals confirmed

From the analysis it becomes clear that many entries in the database do not constitute actual, (properly) registered deals. Of the 25.8 Mha we examined, only 9.0 Mha could be judged as signed deals (35%). Many entries in the Land Matrix were based on plans or ambitions that never materialised in deals; on a few occasions, deals were cancelled at the last moment under public pressure. There are even several very large entries based on Indian government plans to develop wasteland with smallholders – certainly not situations where local farmers lose access to land. This means that in the top-50 sample, the majority of the entries is incorrect, representing 16.8 Mha.

For the 12.5 Mha of entries in the database that we did not cross-check, it is likely that a large fraction also does not constitute true land deals, although we assume that they are usually more correct than the top 50 of entries. Actually, we think that for small deals, below for example 5,000 hectare, the entries are more likely to be based on real developments than on plans in the making. If we assume that all the not-assessed entries would concern true deals, this would lead to an upper boundary of registered true deals of 56%, compared to the total acreage recorded in the Land Matrix.

2.3.2 Relation with biofuels

Some land deals involve crops that almost uniquely serve as biofuel crops, such as jatropha or castor. Land deals involving rice or flowers are not intended to produce biofuels. However, biofuels are generally produced from crops that have multiple outlets: wheat, maize, edible plant oils, sugar cane. If biofuels are to be produced, they are often part of a product range, e.g. the AgroEcoEnergy project in Tanzania aims to produce sugar, energy and biofuel, biodiesel usually has animal feed as a co-product. Some land deals are clearly aiming at biofuels production (it is in the name or mission statement of the company involved). In other words, it is possible to establish a rough understanding of which land deals link to biofuels, but there is a considerable bandwidth of uncertainty.

Within the confirmed land deals, the acreage related to biofuels ranges between 0.5 and 4.9 Mha. The acreage related to biofuels in the not-assessed entries could range between 0.9 and 2.7 Mha, if all entries are correct, which brings the total to 1.4 to 7.6 Mha. Note that the higher range represents the situation where all new crops, on land acquired since the year 2000, that can be used for both food and fuel production (switch crops) would be completely dedicated to biofuels. This implies that the higher range is logically a large fraction of the total of confirmed deals, because the most important crops in the land matrix (oil palm, sugar cane) can be used 100% for biofuels. The reality is that biofuels play a modest role in the application of these crops.

2.3.3 Link to EU biofuels policy

It is complex to establish which part of the biofuel related land deals link to the demand from the EU market, especially because there is a time lag between the closing of the deals and the final production and international market situations can change from year to year. As the time lapse

between these deals and actual production is at least a couple of years (involving possible failure of the project at the end), it is premature to link land deals directly with EU biofuel consumption.

At present, there is insufficient information available to link even biofuels oriented projects to the demand in the EU market, even if projects often use the EU Renewable Energy Directive or the EU Biofuels Directive as part of their argumentation.

We estimate that maximally 10% of the biofuels projects outside the EU have been developed with an interesting future European market in mind. This is a rough estimate, based on the current and near future role of the EU in the world biofuels market (about 20%), which is and will be largely based on EU feedstock (about 75% in the past 5 years) with most of the third country supply already firmly established.

This would imply that the EU biofuels policy could have motivated between 0.05 and 0.49 Mha of the confirmed deals and 0.09 to 0.27 Mha of deals in the not-assessed entries.

We suggest that a better understanding of the link, in future analysis, should be established on the basis of:

- Only a few projects clearly advertise that they intend to sell to the EU market – even though this is no guarantee that they will do so eventually, one can still argue that such investments are motivated for a large part by the EU market;
- For some established producer countries (Brazil, Argentina, Malaysia, Indonesia) one could argue that the fraction of biofuel related land deals (acreage) linked to the EU is in line with the historical biofuel/feedstock exports to the EU;
- For new producer countries it can be assessed to what extent the countries aim to create a domestic biofuels market, or whether they primarily aim at biofuels export.

2.3.4 Land grabbing

Figure 2 visualises the occurrence of concerns within the confirmed land deals.

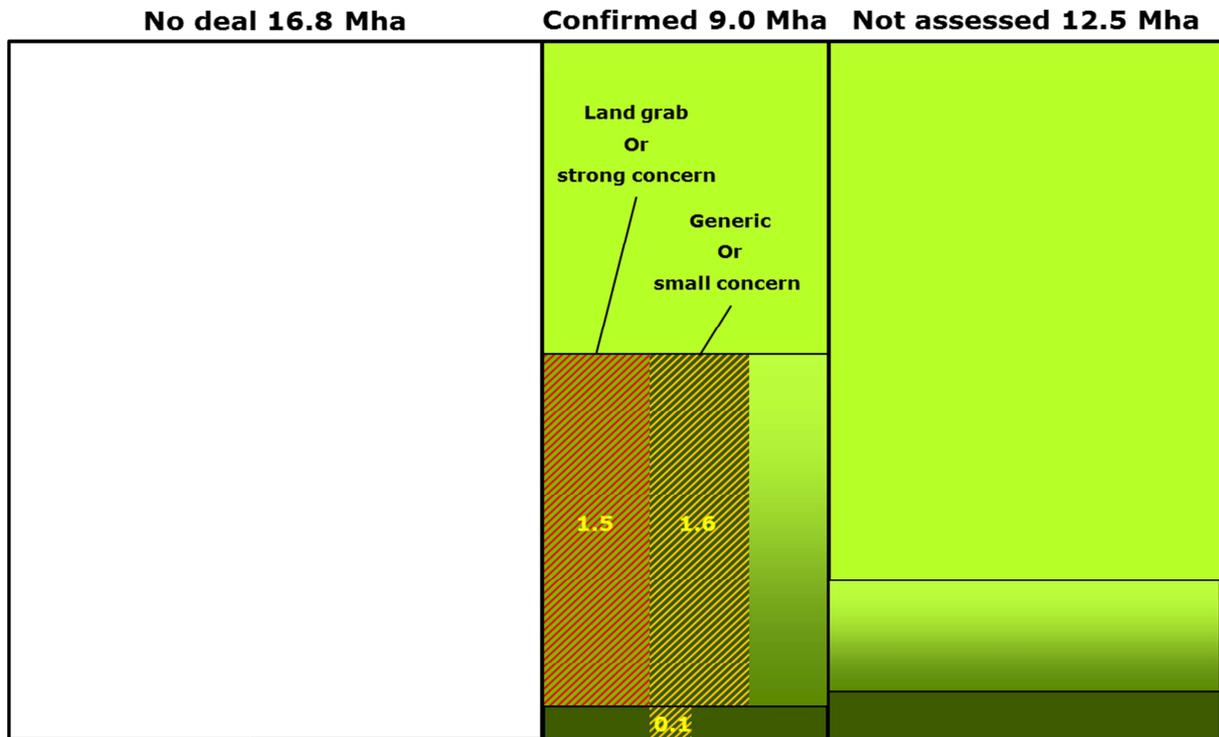


Figure 2. Concerns around land deals within the confirmed acreage, expressed in Mha.

It is nearly impossible to judge whether land has been grabbed following the definitions of the Tirana declaration. Very often there is some level of concern around land deals. Sometimes, these are specific to the project, echoed by multiple stakeholders. In other cases, concerns are generic and not at all related to a specific project, but rather to previous regional negative experience with land deals.

For all the confirmed land deals related to biofuels, we found that between 0 and 1.5 Mha concern either land grabs or have otherwise strong concerns. Between 0 and 0.8 Mha have small concerns that are specific to the project but that would not qualify as strong concerns. Between 0.07 and 0.9 Mha have generic concerns.

As mentioned above we estimate that the role of the EU biofuels policy is maximally 10% in biofuels land deals, we have no reason to assume that this role would be larger or smaller for certain concern categories in the first decade of this century.

If the 12.5 Mha of deals not examined are *all* correct and would *all* constitute land grabs, then an additional 0.9 to 2.6 Mha of biofuels induced land grabs would have to be added (cf. Table 1: biofuels share in the not-assessed deals).

However, by extrapolating the results from the assessed entries (only 35% of the entries concern true deals, and about 30% of the upper boundary of biofuels either concern straightforward land grabs or have otherwise serious concerns), we estimate that in reality a maximum of only 0.3 Mha in

the not-assessed entries could have been grabbed for biofuels purposes. This means that the upper boundary of land grabs around the world caused by biofuels would be about 1.8 Mha of land in total. This assumes that all new switch crop acreage acquired would be fully dedicated to biofuels, which may be a gross overestimation. And the role of the attraction by EU market perspectives would even be a tenfold smaller.

In summary, maximally about 180 thousand hectares of land grabs could have been motivated by EU biofuels policy.

Compare this to claims by Action Aid [2012] that it is estimated that "biofuels have been involved in at least 50 million hectares being grabbed from rural communities". On their website, Oxfam Novib recently claimed that up to 63 Mha of land has been acquired by foreign investors to grow biofuel feedstock³. It must be concluded that Oxfam and Action Aid are fuelling the political debate on biofuels with exaggerated statistics.

2.4 Final note on the Land Matrix

All in all, we find that the Land Matrix and similar initiatives are an important step to understand the extent of large scale land acquisitions around the world. It is a pity that such databases (inherently?) cannot be correct from the onset, cause much confusion when launched and are misused for political purposes.

³ On their website, December 2012, OxfamNovib writes (translated from Dutch): "In the past ten years, 106 million hectares of land (25 times the Netherlands) in developing countries have been bought by foreign investors. According to research, up to about 60% of this fertile and important soil for the local food supply is estimated to be targeted for the production of feedstock for biofuels." (Literally in Dutch: "In de afgelopen tien jaar is 106 miljoen hectare land (25x Nederland) in ontwikkelingslanden opgekocht door buitenlandse investeerders. Deze vruchtbare en - voor de lokale voedselvoorziening - belangrijke grond is volgens onderzoek tot circa 60 procent bestemd voor productie van biobrandstofgewassen.")

3 Improve land governance

Still, 2.5 Mha of land grabs that could be caused by global biofuels policies is a very large amount of land. This implies that many people have been severely impacted. We think that this is not a good reason to scrap the biofuels policies in the EU, on the contrary.

3.1 Improve land policies in developing countries

Several developing countries that were taken by surprise in the land rush period are now developing better legislative and regulatory frameworks to deal with this increased interest for land. In these countries biofuels are even an important leverage to improve land governance at large as well as to improve the agricultural sector.

For example, in Tanzania, the biofuels policy under development acknowledges, first of all, challenges with regard to (amongst others) land acquisition, equitable sharing of project benefits, rural development, and participation of smallholder farmers. One of the specific objectives of the draft policy is to ensure security over land and to avoid land use conflicts. Furthermore, suitable zones for biofuel feedstock production must be identified, mapped out and integrated into land use plans. In principle, land rights are well arranged through the 1999 Land Act, although it is well possible that in practice this Act has not been followed correctly in some biofuel-related land acquisitions. The new policy stipulates that land deals for biofuels should be limited to 20,000 hectares, this both avoids excessive land transactions and allows for a manageable dossier for involved government officials. Compensation should be in accordance with national and international standards. Socio-economic impacts shall be analysed thoroughly through an Environmental and Social Impact Assessment, and measures shall be taken to minimize impacts and to optimise socio-economic benefits. It is proposed that 30% of the feedstock should be sourced from smallholder farmers and, finally, that civil society organisations are to be represented in a supervisory board for policy issues, investments and other developments in the field of liquid bioenergy in Tanzania.

Similarly, in Mozambique a policy-legislation framework has been established with great focus on sustainable socio economic development, additional guidelines for land allocation, etc.

Pangea [2013] found that nine countries – Mali, Nigeria, Senegal, Tanzania, Ethiopia, Angola, Mozambique, South Africa, and Swaziland – have implemented a specific biofuels policy. Fourteen more countries – Burkina Faso, Cote d'Ivoire, Ghana, Guinea-Bissau, Senegal, Sierra Leone, Democratic Republic of Congo, Equatorial Guinea, Kenya, Rwanda, Madagascar, Mauritius, Zambia, and Botswana – are currently developing specific policies, albeit without a definite implementation date. We have not checked those policies, and we must assume that the attention to socio-economic impacts will differ from country to country.

In the policy development process in Tanzania, many stakeholders have given input, including many representatives from civil society organisations. There has been much attention for several well-known examples of land deals related to biofuels that have gone sour, with strong negative impacts on local communities and many generic concerns have been discussed.

We think that important and detailed lessons can be drawn from past bad experiences, but also that there are several good examples that raise the bar. All good and bad experiences should be used to improve agricultural legislation and regulatory frameworks in developing countries. But the ball is in the court of those countries. The EU could play a role in assisting and supporting this process if that is desired.

3.2 Role of EU voluntary schemes for sustainable biofuels

The Renewable Energy Directive introduced the requirement that a limited set of sustainability criteria is confirmed through voluntary schemes. Although the Directive does not include mandatory socio-economic criteria, those schemes that are especially useful for biofuels from Africa, such as the Roundtable on Sustainable Biofuels (RSB) do include strict requirements with regard to land acquisition procedures and other socio-economic aspects.

Projects that receive RSB certification become ambassadors for sustainable agriculture and receive much attention. They can raise the standard for many other agriculture projects on the continent.

3.3 Role of financiers

Investors should understand that African biofuels projects should be handled with great care. In several of the larger biofuels projects currently under development in Africa, development banks are involved. They require that IFC procedures are followed with regard to land acquisition procedures, compensation, education of local farmers, involvement of smallholders etc.

3.4 Developing countries need investments in agriculture

Good biofuels projects can enhance the local food production. Addax Bioenergy in Sierra Leone mitigates potential impacts on food security, through a Farmer Development Program (FDP), including the development of 2,000 hectares of community rice fields and training of over 1400 smallholder farmers through its Farmer Field and Life Schools.

Many developing countries are currently net food importers, because of a lack of agricultural investments in the past. Investment in sustainable biofuel projects can improve the agricultural standards through offering access to know-how, access to means, access to markets and access to finance. Biofuels are a unique opportunity for developing countries to improve their food security, provided that the right policies are installed and that developers and their financiers hold to strict sustainability criteria. European policy in favour of increased use of renewable energy, including biofuels, provides a new opportunity for African farmers and producers.

4 Literature

- ActionAid, 2012, Fuel for thought.
- De Schutter, 2013, Biofuels: animal feed a minor factor, Opinion letter to Financial Times (June 19).
- Ecofys, Agra CEAS, Chalmers University, IIASA and Winrock, 2011, Biofuels Baseline 2008 – for European Commission.
- Ecofys, Fraunhofer, BBH, TU Wien Energy Economics Group and Winrock, 2013, Renewable energy progress and biofuels sustainability – for European Commission.
- Grain 2012- The great food robbery, Barcelona, Spain.
- IIED 2012, The global land rush: what the evidence reveals about scale and geography.
- ILC, International Land Coalition, 2012, Land rights and the rush for land.
- Pangea, 2011, Land Grab Refocus - Roots and possible demise of land grabbing,
- Pangea, 2013, African Policies (web site).
- Pearce, 2012, The Land Grabbers. The new fight over who owns the earth.
- Pisces, 2011, Working brief: biofuels and sustainability: a case study from Tanzania, UK DIFD.
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- World Bank 2011, Report 59463 Rising Global Interest in Farmland: can it yield sustainable and equitable benefits?

Annex 1 Detailed analysis of ILC Land Matrix

Important notice

While we have put in significant effort to double-check entries of the ILC Land Matrix, we do realise that mistakes in analysis and interpretation are possible. If you find that our analysis on a specific entry does not reflect your insights, please contact biofuels@ecofys.com, to improve future editions.

Data selection

In this appendix, we have analysed the top-50 entries (and some more) of the ILC database.

The full database can be downloaded as an Excel spreadsheet from <http://landportal.info/landmatrix> by selecting the link to "Download the complete dataset and form your own opinion". Individual entries can be assessed through the links given at each analysis in this Appendix. We analysed the dataset downloaded on January 30, 2013. In comparison with autumn 2012, when we first did this analysis⁴, ILC has "removed" several entries from the database (they are removed from the spreadsheet, but still accessible on the internet).

The downloaded dataset contained 924 entries, covering a total acreage of 46.9 million hectare. Of these, 617 entries are marked as agricultural deals, with a total acreage of 38.3 million hectare.

Outside the 617 entries marked as agriculture, there are:

- 23 entries that concern forestry, with a total of 1.6 million hectare;
- 84 entries that concern industry, with a total of 1.6 million hectare. Note that there are several "industry" entries that seem so large that they probably constitute something in agriculture or forestry, e.g. one that measures 1.4 Mha (India). One entry of 30 thousand hectare even bears the name "Sub Sahara Biofuels (S.L.) Limited";
- 36 entries that concern livestock, with a total of 0.4 Mha;
- 49 entries that concern mining, with a total of 1.7 Mha. Nearly half of these deals is larger than 10 thousand hectares, which perhaps should be seen as concession areas, with limited loss of land access for local communities;
- 9 entries concern tourism, with a total of 1.9 Mha, including a 1.7 Mha conservation project;

In total, we have analysed 67 entries, with a total acreage of 25.8 million hectare. Thus, 11% of the agricultural entries represent 67% of the agricultural acreage.

We have analysed the top-50 of entries, plus a few entries that we analysed earlier because they belong to the top-5 of their region in the ILC regional categorisation, some regions typically have

⁴ See our report Progress in Renewable Energy and Biofuels Sustainability, prepared for the EC.

larger entries than others. In this way, we could still analyse several entries per region, even though they were not in the global top-50. The top-50 land entries covered 24.4 million hectare in total: 8% of the deals cover 64% of the acreage. Note that the smallest entry in the top-50 still measures 180,597 hectare, which should not be considered small.

Analysis of individual entries

We analysed each entry by using information from the references provided by the ILC and by means of additional information in the public domain on the internet.

Important elements in our assessment are:

- Is this really a land deal, or is it just an announcement?
- When was the land deal closed? (year)
- What crops are involved? (this provides the link with biofuels)
- Are there socio-economic concerns?

Each analysis is preceded by a summary table, with the results that go to the overall analysis.

Is this a deal?

ILC often provides a few links to supporting material. We found that many of the provided links are broken, in particular all the references to the blog entries of the IDLC website, which makes many claims untraceable. Furthermore, many entries in the Land Matrix database do not correspond to specific deals. Often, the areas quoted are mere stated objectives or potentials, or large multi-stakeholder government programmes. Many of the linked references are reports or articles that cover large, multi-deal projects, countries or regions. This could lead to overlap between entries. In many cases, the references given do not allow to come to the large areas claimed.

We have found many plans and ambitions that never materialised in land deals. Some of these plans failed because of resistance from communities or NGO's. While the concerns may have been justified, we record such entries with 0 hectare in our analysis, as we are assessing the extent of what has taken place, not of what could have happened if everything was allowed to happen.

When was the deal closed?

Acreage acquired before 2000 is not taken into account as it is not relevant to understand the role of EU biofuels policy and the alluring EU biofuels market, in land grabbing.

Crop - link to biofuels

The link with biofuels is established on basis of the feedstock. Only the first three crops in the database are taken into account, as equal contribution to the total. Co-products are taken into account in the same way as in the Renewable Energy Directive greenhouse gas accounting methodology (energy allocation). For example, sugar cane acreage can be between up to 100% for biofuels, while soybean can be between up to 32.9% for biofuels (because of the soymeal and

glycerine co-product when producing biodiesel). Unknown crops are assumed to be switch crops that could entirely be used for biofuels.

Classification of concerns

We have only (systematically) reported on socio-economic concerns – not on other concerns. For example, we found that sincere concerns that Chaoda (ILC #151) is involved in fraud in their financial liability statements, however we have not found any socio-economic concerns.

When NGO’s speak on land grabs, they refer to the Tirana declaration:

Land grabs are acquisitions or concessions that are in violation of human rights, particularly the equal rights of women; (ii) not based on free, prior and informed consent of the affected land-users; (iii) not based on a thorough assessment, or are in disregard of social, economic and environmental impacts, including the way they are gendered; (iv) not based on transparent contracts that specify clear and binding commitments about activities, employment and benefits sharing, and; (v) not based on effective democratic planning, independent oversight and meaningful participation.

When assessing land deals from a distance (literally), this definition is not always very useful. We have only found a few cases where we could establish with reasonable certainty that it concerned a land grab. In other cases, there were disputes where some parties claim it is a land deal and others deny this. More problematically are other concerns that sometimes accompany large land deals: people are disappointed, feel that promises have not been kept, projects fail to deliver up to expectation, etc. While such cases would often not be classified as land grabs, they are even more important to record, because it is these concerns that are to date difficult to address in legislation. Often, concerns are not at all related to specific projects, but rather to the region, country or type of activity.

Very often, concerns are mentioned before a deal is closed. While such early warnings are very important to prevent actual grabs, it is not useful in our analysis where we want to understand the extent of what has happened.

We have tried to categorise socio-economic concerns in the following categories:

Land grab	• Proven land grab
Severe dispute	• Strong suspicion of land grab
Strong concerns	• The land deal was not carried out correctly • Local context gives rise to extreme caution
Disappointments	• Impacted communities’ expectations are not met
Generic concerns	• Concerns related to similar activities in region, not specific to the site • Concerns related to the holding company, not specific to the site
Small concerns	• Concerns roughly less than 1% of the total acreage
No concerns	• No concerns found

We have only recorded concerns for the past ten years. Classification in the summary table only concerns socio-economic concerns, not environmental.

We have limited our assessments to one or two pages per entry. It is not our goal to be exhaustive in information, only to analyse the key aspects. References are given to supporting literature.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #144	China	Stora Enso	40,000	Eucalyptus	2009	-
Ecofys assessment:			90,000	Eucalyptus	2004-2009	Strong concerns

Source

<http://landportal.info/landmatrix/get-the-detail/eastern-asia/china/144>

Data quality

This entry is largely based on a detailed and well-documented report by Ping and Nielsen [2010]. This report includes an extensive reaction/declaration supplied by Stora Enso, acknowledging that there are many concerns around their Guangxi activities and stating that they are taking actions to avoid and repair damage, amongst others reviewing all the lease contracts.

Analysis of entry

Stora Enso (Finland) began with plantation activities in Guangxi, China in 2002. They planned to acquire 120,000 ha from five countries of Guangxi by 2010. By 2010, Stora Enso had concluded agreements to lease about 90,000 hectares of forest land, with a mix of state land social land. The deals were closed between 2004 and 2009.

Crops

Of the 90,000 ha, about 75,000 ha is to be planted with eucalyptus trees. It is unclear what will be done with the remaining 15,000 ha.

Concerns

Ping and Nielsen [2010] conclude that the legal procedure was not followed for the acquisition of both household forestland rights and rights to collective-managed forestland. Due to a lack of public notice and approval by collective members, many farmers have been completely unaware of the transfer terms. A widespread lack of documentation further limits public knowledge and clarity. In some cases farmers were even deceived or physically threatened into transfer deals. Systems for notification and resolution of disputes have been unavailable or inadequate.

Stora Enso confirms that they are aware of the concerns raised by Ping and Nielsen and states that they are taking measures to improve the socio-economic impacts from their activities.

Literature

- Ping and Nielsen 2010 – A case study on large-scale Forestland acquisition in China: the Stora Enso plantation project in Hepu County, Guangxi province, http://www.rightsandresources.org/publication_details.php?publicationID=1800.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #145	China	Government	666,667	Jatropha	Unknown	-
Ecofys assessment:			0 – 72,703	Jatropha	2005 – 2010	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/eastern-asia/china/145>

Data quality

The entry is based on a barely documented table in one report [Weyerhaeuser et al. 2007]. Apparently the original information stems from the Yunnan Forestry Department in 2006, which we cannot check.

Analysis of entry

Weyerhaeuser et al. mention an area of 666,667 ha planned for Jatropha expansion over the next fifteen years. We have found no evidence that the plans materialised in any land acquisition. Weyerhaeuser estimate that 50,000 ha of jatropha is currently under development, "most of which is wild".

Wu et al. [2009] evaluates these plans and seriously doubts whether it is feasible. There is only 70,000 ha suitable lands and 1,431,000 ha moderate suitable lands, so that most of the jatropha would have to be planted in moderate suitable land. It would require significant investments to bring this land into cultivation, and the yield would be low.

China daily [2010] reports that Yunnan currently has about 92,713 ha of jatropha and plans to develop (an additional?) 200,100 ha by 2015. Part of this acreage feeds to the company Shenyu New Energy, who claims to increase their contract growing from 20,010 ha to 33,351 ha in 2010 [Biofuels Digest 2010]. This means that at least 20,010 of the 92,713 ha does not involve land deals, but rather concern contract growing arrangements. Besides Shenyu, 10-20 companies seem to be involved.

Crops

Jatropha.

Concerns

There are generic concerns about the displacement of other cash crops (not food) and livestock.

Notes

Besides the 666,667 ha of jatropha in Yunnan, Weyerhaeuser mentions plans for 26,667 ha of jatropha in Guizhou and for 333,333 ha of jatropha in Sichuan. These areas are not mentioned in the ILC database.

Literature

- Weyerhaeuser H, Tennigkeit T, Yufang S and Kahrl F, 2007, Biofuels in China: An Analysis of the Opportunities and Challenges of Jatropha Curcas in Southwest China.
- Wu W G, Huang J K and Deng X Z, 2009, Potential land for plantation of Jatropha Curcas as feedstocks for biodiesel in China, *SCIENCE CHINA Earth Sciences* 53(1): 120-127.
- China daily, 2010-02-22, Sowing the seeds for a truly green revolution.
- Biofuels Digest, 2010 02 24, Shenyu New Energy to increase its jatropha acreage in China by 60 percent; 28 Mgy biodiesel plant envisioned.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #151	China	Chaoda	44,282	Fruit, rice, tea	Unknown	-
Ecofys assessment:			47,662	Fruit, vegetables	2000-2010	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/eastern-asia/china/151>

Data quality

The ILC database refers to the company website of investor Chaoda, which gives no information on land deals.

Analysis of entry

Chaoda Modern Agriculture claims to be a leading Chinese grower of fruits and vegetables, with a production base of over 47,662 ha of farmland in lease at 31 locations all over China (as of June 2010). This area has been developed largely between 2000 and 2010. Through long-term leases, Chaoda consolidates otherwise fragmented plots into large-scale agricultural production bases. They pay a premium to farmers for land leases and recruits them as Chaoda's employees, while investments are made in fields and infrastructure and agricultural operations are standardized. Chaoda claims that this approach increases the farmers' incomes [Chaoda website, 2013].

Crops

Mainly fruit and vegetables, but also rice and mushrooms. Chaoda also breeds livestock.

Concerns

The Chaoda website pays much attention to corporate social responsibility. We have not found any signal of socio-economic concerns.

There are significant concerns about the professional liability [GMI Ratings 2012]. Anonymous Analytics [2011] present a detailed and convincing analysis to conclude that Chaoda is a large scale fraud.

Concerns have previously surfaced that Chaoda has exaggerated its land bank and does not grow all the produce it claims. In fact, it may be buying its produce from third parties and reselling them.

Literature

- Chaoda website, accessed February 2013, www.chaoda.com.hk.
- GMI Ratings, 2012, Governance issue: Chaoda Modern Agriculture on the verge of delisting.
- Anonymous Analytics, 2011, Chaoda Modern Agriculture, 11 Years of Deceit and Corporate Fraud.



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #154	China	Huiyuan Juice	200,000	Flowers, fruit, trees	Unknown	-
Ecofys assessment:			200,000	Fruit	2005-2011	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/eastern-asia/china/154>

Data quality

The ILC database refers to an article in the China Daily [2008].

Analysis of entry

The investor, China Huiyuan Juice Group, is a fruit juice company, owning more than 200,000 ha of orchards according to China Daily [2008]. Based on the company website English information it is not possible to confirm this acreage.

On the contrary, the 2008 annual report states that the company has access to over 4 million hectares of fruit plantations. It is not clear what this means in practice. This acreage is not mentioned in any other annual report by Huiyuan between 2006 and 2011. Every annual report includes purchase of land use rights, with significantly higher costs in 2007 and 2010.

More information would be needed to fully understand the correct amount of land acquired.

Crops

Fruit.

Concerns

We have not found concerns.

Literature

- China Daily, 18 Feb 2008, What crisis?
http://www.chinadaily.com.cn/bw/2008-02/18/content_6461432.htm
- China Huiyuan Juice Group Limited, annual reports 2006-2011, <http://www.huiyuan.com.cn>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #155	China	Chung Hwa Pulp	28,700	Papaya	Unknown	-
Ecofys assessment:			77,997	Forest	2000	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/eastern-asia/china/155>

Data quality

The entry is only based on a company update by MasterLink Securities on the Taiwanese company Chung Hwa Pulp Corp, which is engaged in production and distribution of paper and paper pulp.

Analysis of entry

According to MasterLink's company update, Chung Hwa Pulp Corp owns "400 thousand acre, (or 26,600-hectare)". However, 400,000 acre would equal to about 162 thousand hectare.

According to their own company brochure [2011], Chung Hwa Pulp (CHP) Corp owns 60% of a pulp mill in Dingfung, Guandong, China, in a joint venture with Yuen Foong Yu Paper (YFY). In this brochure, CHP claims to have 77,997 ha of pulp plantations in China. We do not know when the land acquisition took place, only that they invested in 2000. and mentions plans to expand with 100,000 hectares of plantation.

Crops

It's only trees. We could not find any link to papaya.

Concerns

We have not found any concerns.

Literature

- Company update on Chung Hwa Pulp Corp (CHP), available at http://www.masterlink.com.tw/web6/project/english/main_page/files/company_reports/1905%20TT%2020080226.pdf
- Chung Hwa Pulp Corp (CHP), 2011 company brochure, www.chp.com.tw

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #166	Indonesia	Sinar Mas	500,000	Oil palm	2005	-
Ecofys assessment:			90,300	Oil palm	2006	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/166>

Data quality

ILC provides two links, of which only one is working. The source is a report on 'The Kalimantan Border Oil Palm Mega-project' [AIDEnvironment 2006].

Analysis of entry

The so called 'Kalimantan Border Oil Palm Mega Project' was announced by the Indonesian Government in June 2005. The project aim was to create a 1.8 million ha oil palm plantation (the world's largest) 5-10km wide and running for 1,800 km along the Kalimantan-Malaysia border. According to the AIDEnvironment report, Sinar Mas (one of the proposed investors in the project) would be allocated 500,000 ha.

Following significant lobbying by Indonesian civil society and international NGOs, the Government revised its position on the project in May 2006. Amongst the main outcomes was that only 180,000 ha (10%) would be developed (maximally) and that protected areas of the Heart of Borneo would not be touched [Potter 2009].

It is unclear whether any land has been developed to date for this project. We have found no evidence for developments after 2006. Possibly, the initiative has been (partially) replaced with other ambitions, such as the vague plans for development of 5 million hectare of palm oil in East Kalimantan [Kalimantan Palm Oil Fair 2013].

Sinar Mas' palm oil activities fall under their subsidiary SMART. According to SMART's 2011 annual report they have 74 kha oil palm plantations on Kalimantan in 2011 (and 65 kha on Sumatra). The total area of land rights on Kalimantan is 90,298 maximally (as the statistics include some land rights on Sumatra). SMART aims to obtain RSPO certification for all palm oil operations by 2015.

Crops

Oil palm

Concerns

Besides significant concerns about biodiversity, there are generic concerns that the land deal would take place without the free, prior and informed consent of local communities.

Literature

- AIDEnvironment, The Kalimantan Border Oil Palm Mega-Project, Commissioned by Milieudefensie – Friends of the Earth Netherlands and the Swedish Society for Nature Conservation (SSNC), April 2006, Available from: http://www.foe.co.uk/resource/reports/palm_oil_mega_project.pdf.
- Kalimantan Palm Oil Fair, 2013, <http://www.kalimantanpalmoil.com/post/26/Industry-Facts.html>.
- Sinar Mas Agro Resources and Technology (SMART), company website, 2013, <http://www.smart-tbk.com>.



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #174	Indonesia	QIA	500,000	Oil palm	Unknown	-
Ecofys assessment:			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/174>

Data quality

ILC provides four links, of which three are not working. The only working link is a page by ActionAid Italy, which in turn provides three reports that do not mention anything related to this entry.

Analysis of entry

The Qatar Investment Authority (QIA) is listed as the principal investor in this deal, although no information could be found on their corporate website. In 2006, QIA set up Qatar Holding LLC (QH) as a global investment to invest in a broad range of sectors including, commodities and agriculture. In 2011, QH Qatar Holding LLC (QH) set up QH Indonesia, a US\$1billion subsidiary, to identify investment opportunities in Indonesia, mainly in "commodities and natural resources". QIA holds an 85% share and the Government of Indonesia a 15% share.

We could not find any information evidence on this land deal. We assume that it never took place.

Crops

Not applicable.

Concerns

Not applicable.

Literature

- http://www.actionaid.it/it/downl_it/report_ricerca/dirittoalcibo/dirittocibo2010.html
- Qatar Investment Authority, corporate website, Available from: <http://www.qia.qa/>
- Qatar Holding LLC, Press release regarding QH Indonesia, 10 December 2011, <http://www.qatarholding.qa/Pages/default.aspx>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #180	Indonesia	BHP Billiton	355,000	Unknown	2010	-
Ecofys assessment:			0	No crop	Not assessed	Not assessed

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/180>

Data quality

ILC provides one link to a news-item on the website of the Indonesian NGO Down to Earth. The actual information is in a newsletter.

Analysis of entry

The investor for this project is listed as BHP Billiton an Australian-British multinational mining company. This deal in fact relates to 7 mining concessions that the company holds covering 355,000 ha in Central Kalimantan. Without analysis of any details, we assume that the total impact of mining activities will be much smaller.

Crops

It is not an agricultural deal.

Concerns

Not assessed.

Literature

ILC references:

- Indonesia's Coal: local impacts – global links, August 2010, Down to Earth newsletter No. 85-86, <http://www.downtoearth-indonesia.org/sites/downtoearth-indonesia.org/files/85-86.pdf>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #182	Indonesia	PT Minamas	250,000	Oil palm	2000	-
Ecofys assessment:			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/182>

Data quality

The report cited by ILC [Murray Li 2011] does not discuss the company, the acreage, the year or anything else possibly related to such a deal.

Analysis of entry

The entry mentions as investor PT Minamas Plantation, was part of the Guthrie group in 2000. In 2007, the Guthrie group was bought by Sime Darby (Greenpeace, 2008). Today Minamas Plantation is the representative of Sime Darby Plantation in Indonesia.

According to the Sime Darby website, the company has a total concession area in Indonesia of 299,263 ha (see entry ILC #186). We assume that these entries overlap. Therefore, we mark the current entry as no deal, with 0 hectares.

Crops

Not applicable

Concerns

Not applicable. See ILC #186 for assessment of concerns relating to Sime Darby in general.

Literature

- Tania Murray Li (2011): Centering labor in the land grab debate, The Journal of Peasant Studies, 38:2, 281-298, www.tandfonline.com/doi/abs/10.1080/03066150.2011.559009.
- http://www.simedarbyplantation.com/Sime_Darby_Plantation_in_Indonesia.aspx.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #184	Indonesia	Several	1,100,000	Corn, oil palm, sugar	2009	-
Ecofys assessment:			552,000	Forest, oil palm, sugar cane	2010-2011	Land grab

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/184>

Data quality

ILC provides two references that discuss the Merauke Integrated Food and Energy Estate (MIFEE) project [LDPI 2011, WPAN, 2011], initiated by the Indonesian government.

Analysis of entry

The estimated area involved ranges from just over half a million hectares to 2.5 million ha, depending on the source to be developed over the coming two decades [DTE 2011a]. DTE further explains that the “total targeted area for the project at present is 1,282,833 hectares (423,251.3 hectares in 2010-2014; 632,504.8 hectares in 2015-2019; and 227,076.9 ha in 2020-2030). However, according to the Local Investment Promotion Board (Badan Promosi Investasi Daerah), 36 companies have acquired permits to more than 2 million hectares as of May 2011”. Permits are a first step and do not always result in deals.

In August 2011, the government considered shifting the initiative to East Kalimantan because of the limited availability of land in Papua, [Jakarta Globe Online 2011] and problems with acquiring customary land [Land Watch Asia 2011]. However, as postings by awasMIFEE, an activist organisation resisting against the MIFEE initiative, continue in 2012, we must assume that the project is not yet cancelled.

The reasonably documented awasMIFEE report [2012] provides data on the extend of land deals that have been (more or less) closed, on basis of which we estimate that maximally about 830,000 hectares of deals have been closed or are in a far stage of closing. The Papuan government reduced the planned area to 552,000 hectare in 2011.

Crops

The aim of the MIFEE project is to produce sugar, rice, corn, palm oil soybeans and livestock. AwasMIFEE estimates that 50% of the area would be dedicated to wood plantations, 20% to oil palm, 21% to sugar cane and 8% to food crops.

Concerns

Many social concerns are reported, including deceiving villagers into handing over ancestral land, coercion into signing land deals, not providing satisfactory compensation for the loss of land (only providing compensation for the value of the wood and not for the loss of land or loss of livelihood etc) as well as lack of transparency in the calculation of compensation and not fulfilling commitments made regarding providing facilities and infrastructure for the villagers (e.g. schools, roads).

While it is difficult to confirm these concerns, we find the reports so convincing that we classify this as a possible land grab.

Literature

- LDPI 2011, Land Deal Politics Initiative, Resisting Agribusiness Development: The Merauke Integrated Food and Energy Estate in West Papua, Indonesia, http://www.future-agricultures.org/index.php?option=com_docman&task=cat_view&gid=1552&Itemid=971.
- WPAN, 2011, West Papua Action Networks, War Profiteer of the Month: Merauke Integrated Food and Energy Estate (MIFEE) – A Food Project Invasion in West Papua, <http://wpan.wordpress.com/2011/04/30/war-profiteer-of-the-month-merauke-integrated-food-and-energy-estate-miffee-a-food-project-invasion-in-west-papua/>
- awasMIFEE, An Agribusiness Attack in West Papua: unravelling the Merauke Integrated Food and Energy Estate, April 2012, https://awasmiffee.potager.org/uploads/2012/03/miffee_en.pdf.
- DTE 2011a, Down to Earth, Special Edition Newsletter, No. 89-90, November 2011, The Land of Papua: a continuing struggle for land and livelihoods, <http://www.forestpeoples.org/sites/fpp/files/news/2011/12/DTE%2089-web.pdf>.
- Down to Earth, 2011, NGOs urge Indonesia to heed MIFEE moratorium call, <http://www.downtoearth-indonesia.org/story/ngos-urge-indonesia-heed-miffee-moratorium-call>.
- Jakarta Globe online, Indonesia Turns Back on Papua Food Bowl Plan, 15 August 2011, <http://www.thejakartaglobe.com/business/indonesia-turns-back-on-papua-food-bowl-plan/459493>.
- Land Watch Asia, Indonesia's mega food estate may 'undo' Marind tribe, 21 July 2011, <http://landwatchasia.wordpress.com/2012/07/21/indonesias-mega-food-estate-may-undo-marind-tribe/>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #186	Indonesia	PT Minamas	287,390	Oil palm	-	-
Ecofys assessment: needs review			199,508	Oil palm	< 2000	No concerns
			99,755		≥ 2000	

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/186>

Data quality

The entry is based on the Sime Darby Plantation company website.

Analysis of entry

It has not been possible with the information available to identify this specific land deal. Sime Darby Plantation is represented by its subsidiary Minamas Plantation in Indonesia. According to the Sime Darby website, the company has a total concession area in Sumatra, Kalimantan and Sulawesi of 299,263 ha, of which 204,845 ha have to-date been planted with oil palm.

The concessions have been acquired and developed over a long period of time, we assume that $\frac{2}{3}$ of the plantation area was already existing prior to 2002, as the land bank (of preceding companies) in 2002 was already 215,047 ha). We suppose the entry overlaps with ILC #182.

Crops

Oil palm.

Concerns

In 2008 Greenpeace published the 'Burning up Borneo' report on oil palm plantations. Specifically for Sime Farby they cited issues with fire hotspots. An Aidenvironment study, commissioned by Unilever to verify the report, concluded that the Greenpeace report was broadly accurate overall.

Today the Sime Darby website states that, of the 22 mills the company runs in Indonesia, 19 have received RSPO certification and the rest are ready to be audited for certification.

Literature

- Sime Darby Indonesia Plantation history:
http://www.simedarbyplantation.com/Sime_Darby_Plantation_in_Indonesia.aspx
- Greenpeace, 2008, How Unilever Palm Oil Suppliers are Burning Up Borneo,
<http://www.greenpeace.org/international/Global/international/planet-2/report/2009/10/how-unilever-palm-oil-supplier.pdf>.
- Aidenvironment, 2009, Verification of the Greenpeace report 'Burning up Borneo',
[http://www.unilever.com/images/sd_VerificationoftheGreenpeacereportBurning%20up%20Borneo\(2009\)_tcm13-212668.pdf](http://www.unilever.com/images/sd_VerificationoftheGreenpeacereportBurning%20up%20Borneo(2009)_tcm13-212668.pdf).

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #187	Indonesia	First resources	200,000	Oil palm	-	
Ecofys assessment:			50,000	Oil palm	<2003	Small concerns
			90,000		2008	
			100,000		2011	

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/187>

Data quality

The entry is based on the company website.

Analysis of entry

The First Resources website indicates that it acquired a land bank of 90,000 ha in West Kalimantan in 2008, and a further 100,000 ha in East Kalimantan in 2011. Between 1993 and 2003 they achieved 50,000 ha plantation. Currently (March 2013), the company has 146,000 ha oil palm plantations and operates 11 palm oil mills in Indonesia.

Crops

Oil palm

Concerns

First Resources is a member of RSPO, although they have not yet received actual RSPO certification. On 10 December 2012, RSPO issued a letter of complaint to First Resources (following an official complaint from EIA) with concerns over not obtaining free, prior, informed consent before developing plantations and inadequate measures to ensure maintenance of high conservation areas. In response, First Resources claims to have halted land clearing operations in the 400 ha 'disputed area'.

We consider the concerns about 400 ha, which the company says to resolve as a minor issue.

Literature

- First Resources company website, www.first-resources.com/milestones.php.
- Environmental Investigation Agency (EIA) complaint to RSPO regarding First Resources, 17 October 2012, http://www.eia-international.org/wp-content/uploads/PT-BSMJ_NPP_Grievance_ALL_171012_FINAL.pdf
- RSPO letter to First Resources, 10 December 2012: <http://www.rspo.org/file/PTBSMJFR.pdf>
- Response from First Resources to RSPO, 17 December 2012, <http://www.first-resources.com/UploadPDF/Pdf264.pdf>.



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #189	Indonesia	Golden Agri	427,253	Oil palm	-	-
Ecofys assessment:			470,800	Oil palm	2011	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/189>

Data quality

The two sources provided by ILC do not provide any useful information to understand this entry. They both relate to a proposed land deal in Liberia –not in Indonesia. Also see ILC #1396.

Analysis of entry

Golden Agri-Resources Ltd (GAR) is listed as the investor for this deal. Their Indonesian palm oil activities partially fall under Sinas Mas Agro Resources and Technology (SMART). At the end of 2011, GAR managed 361,100 ha of nucleus oil palm plantations in Indonesia (as well as 94,600 ha of smallholder oil palm plantations) [Golden Agri annual report 2011]. Additionally, GAR has an unplanted land bank of about 200,000 ha. The total acreage of land rights of GAR in Indonesia, without the 90,300 ha for Sinar Mas related to Kalimantan already included in entry ILC #166 would thus become 470,800.

This entry does not appear to correspond to a 'deal' as such, rather it is the total plantation area under management, acquired over a long period of time.

Crops

Oil palm.

Concerns

GAR (and its subsidiary SMART) was previously subject to significant criticism from Greenpeace over its environment record, particularly over allegations of illegal forest clearance, which culminated in the release of a report in February 2009. This resulted in GAR being boycotted by Neste, Unilever and Burger King in 2009-2010. Following this, in February 2011, the company committed itself to protecting forests and peatlands with a high level of biodiversity, or which provide major carbon sinks, as part of an agreement with The Forest Trust (TFT), a Geneva-based non-profit organisation. According to GAR press releases, both Neste and Unilever resumed purchases of palm oil in September and October 2011 respectively. Greenpeace appears to be supportive of the initiatives that GAR has undertaken to date and issued a statement to this effect in June 2012 (although they will continue to monitor the company's performance in this area).

GAR was accepted as an RSPO member in April 2011, with 58,144 ha certified as of 2011. Its aim is for all plantations (as at 30 Jun 2010) to be certified by December 2015.

Notes

This analysis should be improved by understanding how the land bank grew over the past decades.

Literature

- Golden Agri annual report 2011, <http://www.goldenagri.com.sg>.
- Greenpeace, Illegal Forest Clearance and RSPO Greenwash: Case studies of Sinar Mas, 14 February 2009, <http://www.greenpeace.org/usa/Global/usa/report/2010/1/illegal-forest-clearance-and-r.pdf>.
- Greenpeace, Greenpeace welcomes Golden Agri-Resources progress towards a 'no deforestation footprint' for palm oil, 6 June 2012, <http://www.greenpeace.org/seasia/Press-Centre/Press-Releases/progress-towards-a-no-deforestation-footprint/>.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #190	Indonesia	Inday Kiat	2,388,468	Papaya	-	-
Ecofys assessment:			760,584	Pulpwood	< 2000	Sincere concerns

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/190>

Data quality

ILC refers to the 2007 APP Environmental and Social Sustainability Report for Indonesia.

Analysis of entry

Indah Kiat Pulp & Paper (operating company of APP - Asia Pulp and Paper) is the principal investor for this entry. The 2007 APP Environmental and Social Sustainability Report for Indonesia does not mention any specific deal of this size. On the contrary, 2,388,468 ha is the total area of APP concessions (as of 31 December 31 2007) under license to Sinar Mas Forestry (APP's exclusive fiber supplier). Of this, 1,865,848 ha are located in Sumatra and 522,620 ha in Borneo (Kalimantan).

According to the APP sustainability report, 1,426,647 ha (60% of the total concession area) has been approved for plantation development. By 2007, 760,584 ha (32%) was established as pulpwood plantations. The balance of this area (28%) was either degraded forest (151,439 ha) or bare earth, scrub lands, waste lands, or fire-damaged areas awaiting reforestation (514,624 ha in aggregate). A total of 961,821 ha (40% of the total concession area) has been set aside as conservation area, reserves for community use, indigenous species and infrastructure. For the moment, we consider the concession to work as a land deal for 760,584 ha, which are not available for non-APP activities anymore. If part of the remaining area would also be "reforested", this value may need adjustment.

A comment was added to this entry on 16 May 2012 stating, "A google search will show that much of the area you are referring to has been allocated prior to 2000 and should therefore be excluded here. Also, it seems strange to include forestry concession since these can hardly be considered land grabs - more selective right allocation." On basis of this statement, which we could not check, we assume that the concession was given before 2000.

Crops

While the entry mentions papaya as the main crop, no evidence of investments in papaya cultivation can be found. Instead, APP activities concern pulpwood.

Concerns

The activities of APP in general have attracted significant concerns in the past decade.

Literature

- Asia Pulp and Paper Environmental and Social Sustainability Report for Indonesia (2007), [http://www.asiapulppaper.com/portal/APP_Portal.nsf/Web-MenuPage/5BFB083D5FD9781C472575EF0035E314/\\$FILE/090724%20APP-2007-New%20Rev1Final.pdf](http://www.asiapulppaper.com/portal/APP_Portal.nsf/Web-MenuPage/5BFB083D5FD9781C472575EF0035E314/$FILE/090724%20APP-2007-New%20Rev1Final.pdf)

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #191	Indonesia	Indo Agri Food	590,791	Oil palm, rubber, sugar	2007	-
Ecofys assessment: more info needed			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/191>

Data quality

ILC refers to the company website.

Analysis of entry

Indo Agri Food Resources is cited as the investor for this deal. 23% of the 2011 palm oil was RSPO certified. We could not find any evidence that the company was involved in the acquiring “new” land. On the contrary, the company annual report reveals that in 2007 already existing land banks were acquired from other organisations with a total of 580,791 ha. This is almost similar to the number presented by ILC. We conclude that there is no deal.

Crops

Not applicable. The company is involved in oil palm, rubber, sugar cane, cocoa and tea.

Concerns

Not applicable as we conclude there is no new deal. However, note that a large part of the land was acquired from Lonsum, who was accused of illegal land clearing and social concerns, including inadequate recognition of customary land rights and inadequate settlement of compensation agreements in a report by AIDEnvironment. Friends of the Earth highlighted a land dispute running since the 1970s between the villagers of Pergulaan (North Sumatra) and Lonsum. The Indonesian Institute for Policy Research and Advocacy (ELSAM) is also extremely critical of Lonsum, citing evidence of human rights abuses in Pergulaan and four other villages in North Sumatra.

Notes

More insights are needed in how the land bank increases in time and how much concerns new land.

Literature

- Company website, Annual report 2000-2009, Available from: www.indofoodagri.com/
- AIDEnvironment (Commissioned by Greenpeace), Funding Forest Destruction, The involvement of Dutch banks in the Financing of Oil Palm Plantations in Indonesia, March 2000, www.profundo.nl/files/download/Greenpeace0003.pdf

- ELSAM, Human Rights Violation in the Palm Oil Plantation PT PP Lonsum Tbk-North Sumatera, Jakarta 2010, <http://pilnetindonesia.files.wordpress.com/2013/02/human-right-violation-in-palm-oil-plantation-pt-pp-lonsum-tbk-north-sumatra.pdf>
- Friends of the Earth, Losing Ground, The human impacts of palm oil expansion, February 2008, http://www.foe.co.uk/resource/reports/palmed_off.pdf

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #194	Indonesia	Asto Agro Lestari	298,534	Oil palm	-	-
Ecofys assessment: needs improvement			110,678	Oil palm	<2000	No concerns
			110,678		≥2000	

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/indonesia/194>

Data quality

ILC refers to the 2010 Astra Agro Annual Report. It does not contain specific information about a land deal of this size. A second reference does not work.

Analysis of entry

PT Astra Agro Lestari has oil palm plantations in Indonesia. According to their annual reports, the company has a total of 266,706 ha oil palm plantations in Sumatera, Kalimantan and Sulawesi. This is the sum of nucleus plantation (owned plantations) and plasma sites (smallholders). In 2010, the company holds 221,356 ha of HGU (Land Cultivation Rights Title), which has been acquired over a period of many years since the company started in 1983. Without access to more detailed information, we assume that half of this area was acquired after 2000.

Crops

Oil palm.

Concerns

There are a number of negative reports available with regard to land clearing and burning by the company, especially in the Tripa area of Aceh. Greenpeace [2008] cites issues with deforestation and fire hotspots. We have not found any socio-economic concerns.

Literature

- Company website and Annual Reports, www.astra-agro.co.id
- Greenpeace, 2008, How Unilever Palm Oil Suppliers are Burning Up Borneo, available from: <http://www.greenpeace.org/international/Global/international/planet-2/report/2009/10/how-unilever-palm-oil-supplier.pdf>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #319	Malaysia	Jaya Tiasa	1,032,550	Eucalyptus, oil palm, trees	2005	-
Ecofys assessment:			83,480	Oil palm	2005	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/malaysia/319>

Data quality

ILC provides a link to a report by Friends of the Earth, which does not provide any information about such a deal. The other link is to the company website.

Analysis of entry

None of the links provided by ILC could confirm the area deal. The company homepage confirms that the total area "used" by the company is 1,032,550 ha, consisting of 713,211 ha forest concessions, 83,480 ha for palm oil (presumably the HGU rights, because not all planted) and 235,859 ha of reforestation. It seems that the company only recently started their palm oil activities, therefore we assume that all 83,480 ha was acquired after 2005. We assume that the concessions for forestry and reforestation cannot all be seen as land that limit the access to land for communities.

Crops

Forestry, reforestation plantations, oil palm

Concerns

The report by Friends of the Earth [2008] indicates that the parts of the plantation may be involved in environmental issues, like forest burning to clear the field, also on peat land. The company is suspected to cultivate areas that were before declared as protected area but later out licenced to the company. We have not found socio-economic concerns.

Literature

- Friends of the Earth International, 2008, Malaysian palm oil – green gold or green wash?
<http://www.foei.org/en/resources/publications/pdfs/2008/malaysian-palm-oil-report>.
- <http://www.jayatiasa.net>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #328	Malaysia	Ta Ann	675,517	Oil palm, trees	Unknown	-
Ecofys assessment:			74,395	Oil palm	≥2000	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/malaysia/328>

Data quality

ILC refers to a report by Global Witness and to a report by Friends of the Earth International. Both reports do not mention any land deal in connection to Ta Ann.

Analysis of entry

The 675,517 ha are quoted from Global Witness [2011]. It is sum of the timber concession and forest plantation licences. These data confirm with data on the company webpage. Additionally the company page gives 74,395 ha oil palm land banks in 2011. We assume that the concessions for forestry and reforestation cannot all be seen as land that limit the access to land for communities.

Company statistics show that the first (negligible) harvest of FFB was in 2002. Therefore we assume that most of the palm oil related land rights have been acquired after 2000.

Crops

Palm oil.

Concerns

The report by Friends of the Earth indicates that the parts of the plantation may be involved in environmental issues, like forest burning to clear the field, also on peat land. The company is suspected to cultivate areas that were before declared as protected area but later out licenced to the company. No socio-economic concerns were noted.

Literature

- Global Witness, 2011, Pandering to the loggers- Why WWF's Global Forest and Trade Network isn't working, <http://www.globalwitness.org/Panderingtotheloggerspress>
- Company website, <http://www.taann.com.my/>
- Friends of the Earth International, 2008, Malaysian palm oil – green gold or green wash? <http://www.foei.org/en/resources/publications/pdfs/2008/malaysian-palm-oil-report>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #329	Malaysia	Samling Global	1,838,000	Acacia, Rubber, Trees	Unknown	
Ecofys assessment:			1,400,000 430,000	Forest Oil palm	≥2000	Land grab

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/malaysia/329>

Data quality

ILC provides reference to a report by Global Witness and to a corporate website that does not give relevant information. Samling seems to have no internet presence (anymore).

Analysis of entry

The Council on Ethics notes in their recommendation report that Samling Global holds 1,400,000 ha forest concessions and 430,000 ha plantations in Malaysia, these are not further defined. The total is close to acreage mentioned in the Land Matrix database. We could not find when this area is acquired and assume that it is after 2000.

Crops

Forestry and plantations. Plantations concern amongst others oil palm [Council on Ethics, 2010].

Concerns

The company are accused from several NGO to be involved in illegal logging (on deep slopes, along roads) and those parts of their licences are covering protected areas. The company is further accused of frequent allegations of human rights abuses perpetrated by security forces against communities in conflict with Samling, including beatings, detention and ill-treatment in custody, and land rights cases against the company have been working through the courts since 1998 [Global Witness 2011].

Literature

- Global Witness, 2011, Pandering to the loggers- Why WWF's Global Forest and Trade Network isn't working, <http://www.globalwitness.org/Panderingtotheloggerspress>.
- Company website, <http://www.samling.com>.
- Council on Ethics – The Government Pension Fund Global "Recommendation of 22 Feb. 2010 to the Ministry of Finance" regarding Samling, http://www.regjeringen.no/upload/FIN/etikk/Recommendation_Samling.pdf

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #331	Malaysia	BPP	200,000	Acacia	unknown	-
Ecofys assessment:			508,000	Acacia	2002	Land grab

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/malaysia/331>

Data quality

ILC refers to an article by Barney [2004] which partially describes the project as an example of successful local resistance to displacement-inducing plantations. A second link is to a Friends of the Earth report [2008] which mentions the project only once, in a table – without further details – referring to annual reports.

Analysis of entry

In 1996, 200,000 ha of acacia plantation was planned in Sarawak, Borneo, in the frame of the Borneo Pulp and Paper project, a joint venture between Asia Pulp and Paper and the Malaysian government. After much resistance by local communities, the government decided to stop/change the project in May 2002, just after planting of about 15,000 ha commenced in March 2002. According to Friends of the Earth [2008] BPP had a 13,721 ha acacia plantation license in 2007, which seems to coincide with the commenced planting in 2002.

According to CIRAD [2006], the project continued without APP in a new joint venture between the Malaysian government and the Grand Perfect consortium (KTS, Samling and Ta Ann), under a new name, "Planted Forest Pulp and Paper Project" (PFPP project), with a total project area of 508,000 ha. CIRAD reports that under the BPP project 24,600 ha was planted between 1997 and 2003, while 8500 ha was planted under the PFPP project in 2003 and 2004, and 24,000 ha in 2005.

Crops

Acacia.

Concerns

Since the start of the BPP project, there have been legal cases concerning the land rights. A very recent report by Global Witness convincingly demonstrates that most land deals in Sarawak are subject to corruption and that the indigenous population has been systematically robbed from their natural resources in the past decades.

Literature

- Barney K, 2004, Re-encountering resistance: Plantation activism and smallholder production in Thailand and Sarawak, Malaysia, *Asia Pacific Viewpoint* 45(3):325–339.
- Friends of the Earth International, 2008, Malaysian palm oil – green gold or green wash? <http://www.foei.org/en/resources/publications/pdfs/2008/malaysian-palm-oil-report>.
- CIRAD, 2006, Feeding China’s Expanding Demand for Wood Pulp: A Diagnostic Assessment of Plantation Development, Fiber Supply, and Impacts on Natural Forests in China and in the South East Asia Region, <http://hal.archives-ouvertes.fr/docs/00/19/60/37/PDF/Malaysia.pdf>
- Global Witness, 2013, Corruption in Malaysia laid bare as investigation catches Sarawak’s ruling elite on camera, <http://www.globalwitness.org/library/corruption-malaysia-laid-bare-investigation-catches-sarawak%E2%80%99s-ruling-elite-camera>.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #433	Philippines	NRG Chemicals	700,000	Jatropha	Unknown	-
Ecofys assessment:			0	Jatropha	2007	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/philippines/433>

Data quality

The reference provided by ILC was not traceable, as it concerned a personal communication.

Analysis of entry

Several media mention the deal, but only around May 2007. For example the Myanmar Times which quotes the UK company NRG Chemical Engineering that they will invest US\$600 million in Jatropha plantations that will cover over a million hectares, mainly on the islands of Palawan and Mindanao. It seems that the plans were abandoned in September 2007 [Alternat1ve] and that the company was dissolved in 2009 [CompaniesList]. We assume that the plans never materialised in a deal.

Crops

Jatropha.

Concerns

We could not find any concerns.

Literature

- Myanmar Times, Planting seeds of biofuel where little else will grow, November 5-11, 2007, Volume 20, No. 391, available at <http://mmtimes.com/no391/b004.htm>.
- Alternat1ve, 2007, PNOC-AFC and UK NRG Chemical Eng cancel tie-up plans, <http://www.alternat1ve.com/biofuel/2007/09/05/pnoc-afc-and-uk-nrg-chemical-eng-cancel-tie-up-plans/>
- CompaniesList: <http://www.companieslist.co.uk/05574018-nrg-chemical-engineering-limited>.



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #435	Philippines	Bioenergy North Luzon	200,000	Coconut	Unknown	
Ecofys assessment:			0	Coconut	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/philippines/435>

Data quality

ILC refers to a study by Bernabe [2010] and which is not publicly accessible (“unpublished paper commissioned by Oxfam-GB Philippines”).

Analysis of entry

This entry refers to Bioenergy North Luzon, which was in June 2009 involved in a Memorandum of Understanding between Department of Environment and Natural Resources, the Philippine Coconut authority and another company, Pacific Bio-fields, about 400,000 ha coconut plantation development [iBangui, The Philippine Star 2009]. Apparently, at that moment about 1,000 or 1,500 ha were already planted, but that was before the project plans. It is unclear if the MoU can be regarded as a closed deal for the companies involved.

As of December 2011, Pacific Bio-Fields is dissolved [Duedil]. We could not find any relevant news about this “deal” after 2009. We assume it did not materialise.

Crops

Coconut.

Concerns

Not assessed.

Literature

- <http://newsinfo.inquirer.net/breakingnews/nation/view/20090620-211566/Vast-tracts-of-land-leased-to-bio-diesel-firm>.
- Blog at iBangui. <http://ibangui.wordpress.com/2009/06/28/filipino-japanese-investors-earmark-p3-5b-for-coco-biofuel-devt-in-northern-philippines/>.
- Philippine Star, <http://www.philstar.com/business/483123/japanese-group-invest-p35-billion-ilocos-coco-biodiesel-project>.
- Duedil: <https://www.duedil.com/company/06907495/pacific-bio-fields-holdings-plc>.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #449	Philippines	San Miguel, Kuok	1,000,000	Cassava, Corn, Oil palm	2008	-
Ecofys assessment:			0	Multiple	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/philippines/449>

Data quality

ILC refers to a post on farmlandgrab which indeed mentions the 1 million ha plan in the Philippines.

Analysis of entry

In 2008, the Malaysian Kuok Group and the Filipino San Miguel Corporation announced that they would develop one million ha of farm land, in reaction to the rising prices of food and fuel [FT 2008]. For this plan, the Philippine government allocated 1 million ha of 'marginal' and 'uninhabited' lands, under a Memorandum of Understanding. The land would be tilled by tenant farmers, while the government would keep ownership [AFP 2008]. It is unclear how much land has been developed to-date. We consider this not to be a land deal.

Crops

Original plans mention the production of rice, corn, sugar and other crops. Borras et al [2011] reports that the key crops are cassava and oil palm.

Concerns

The companies' official declarations state that food security would be improved by transforming marginal, idle and uninhabited lands into productive spaces. On the other hand, Borras et al. conclude that the allocated lands are significantly populated and already productive. They further conclude that local population was persuaded to become part of the company's outgrower schemes. According to BusinessWeek Mindanao [2011] the Filipino Department of Agriculture is planning to review the MoU to ensure that farmers will be able to benefit from agriculture land development and land lease deals.

Literature

- Borras and Franco 2011 - Political Dynamics of Land-grabbing in Southeast Asia (<http://www.tni.org/sites/www.tni.org/files/download/Political%20Dynamics%20of%20Land-grabbing%20in%20Southeast%20Asia.pdf>).

- FT, 2008 07 03, Financial Times, San Miguel in \$1bn food deal with Kuok.
- AFP, 2008 07 02, Philippine's San Miguel, Malaysia's Kuok agree farm project.
- BusinessWeek Mindanao, 2011, DA to review SMC-Kuok farm land deal with govt, <http://www.businessweekmindanao.com/2011/10/06/da-to-review-smc-kuok-farm-land-deal-with-govt/#ixzz2OOUB4l2Q>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #483	Philippines	Savola Group	232,000	Cassava, jatropha, oil palm, sugar cane	Unknown	-
Ecofys assessment:			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/philippines/483>

Data quality

ILC refers to a study by Bernabe [2010] and which is not publicly accessible (“unpublished paper commissioned by Oxfam-GB Philippines”).

Analysis of entry

None of the annual reports of the supposed investor (the Savola Group from Saudi Arabia) between 2003 and 2011 mention any activities in the Philippines. We assume that the plans never existed or never materialised.

Crops

Not assessed.

Concerns

Not assessed.

Literature

- Savola Group annual reports 2003-2011, <http://www.savola.com>.



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #556	India	Mission NewEnergy	194,000	Jatropha	Unknown	-
Ecofys assessment:			0	Jatropha	n/a	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/india/556>

Data quality

ILC refers to the company website of Mission NewEnergy and to a website by ActionAid Italy, which in turn presents three documents, two of which contain a map that shows jatropha activities by Mission NewEnergy in Malaysia and India with only a rough indication of acreage, but without further details.

Analysis of entry

According to the 2011 annual report by Mission NewEnergy, they increased their jatropha acreage through a contract farming model in India by over 46,000 acres, to a total of 194,323 acres. This equals 78,639 ha. So, on the one hand, ILC has mistaken acres for hectares and on the other hand, this acreage is developed with smallholders, so this does not comprise a land deal. Possibly there is overlap with other ILC entries for India (#610, #631, #640, #641 and/or #642)

Crops

Jatropha.

Concerns

No concerns found.

Literature

- Mission NewEnergy annual report 2011, <http://www.asx.com.au/asxpdf/20111025/pdf/42207053l40319.pdf>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #610	India	Unknown	400,000	Jatropha	2007	-
Ecofys assessment:			0	Jatropha	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/india/610>

Data quality

ILC refers to Ariza-Montobbio [2010] which does not discuss any deal or plan on 400,000 ha.

Analysis of entry

We could not find any information on this supposed deal. Note that according to Baka [2011] about 407,000 ha of jatropha existed in India in 2008, however we did not find any details to how this has been organised. Moreover, we suppose this has a large overlap with acreage further discussed in ILC #631, #640, #641 and #642.

Crops

Jatropha

Concerns

Not assessed.

Literature

- Ariza Montobbio et al., 2010, The political ecology of Jatropha plantations for biodiesel in Tamil Nadu, India, *Journal of Peasant Studies*, 37(4): 875–897.
- Baka 2011 - Biofuels and wasteland grabbing how India's biofuel policy is facilitating land grabs in Tamil Nadu, India.



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #631	India	Government	85,900	Jatropha	Unknown	-
Ecofys assessment:			0	Jatropha	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/india/631>

Data quality

ILC refers to Ariza-Montobbio [2010] which does not discuss any deal or plan on 85,900 ha.

Analysis of entry

Ariza-Montobbio describes the distribution of wasteland to the rural poor as a model of Jatropha promotion. As part of a National Watershed Development Program for Rainfed Areas (NWDPR), launched in 1990-91, about 2 Mha of wasteland would be transferred to eligible small farmers and landless households in Andhra Pradesh (see ILC #641), about 150,000 ha in Karnataka (see ILC #642), about 180,000 ha in Kerala (see ILC #640) and about 100,000 ha in Tamil Nadu, which presumably coincides with this entry.

Although this can be seen as a land deal, we will mark it as 0 ha, because it does not constitute land taken from communities, but rather the reverse (we should mark -100,000 ha instead). The intention is that the farmers will produce pro-poor crops such as jatropha on the former wasteland.

Crops

Jatropha.

Concerns

According to Ariza-Montobbio, large farmers have more advantages of the jatropha schemes than small farmers, amongst others because of relatively lower yields and higher practical entry barriers.

Literature

- Ariza Montobbio et al., 2010, The political ecology of Jatropha plantations for biodiesel in Tamil Nadu, India, *Journal of Peasant Studies*, 37(4): 875–897.



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #640	India	Government	180,000	Jatropha	Unknown	-
Ecofys assessment:			0	Jatropha	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/india/640>

Data quality

ILC refers to Ariza-Montobbio [2010] which mentions plans for 180,000 ha jatropha in a footnote.

Analysis of entry

Ariza-Montobbio describes the distribution of wasteland to the rural poor as a model of Jatropha promotion. As part of a National Watershed Development Program for Rainfed Areas (NWDPR), launched in 1990-91, about 2 Mha of wasteland would be transferred to eligible small farmers and landless households in Andhra Pradesh (see ILC #641), about 150,000 ha in Karnataka (see ILC #642), about 180,000 ha in Kerala (this entry) and about 100,000 ha in Tamil Nadu (see ILC #631).

Although this can be seen as a land deal, we will mark it as 0 ha, because it does not constitute land taken from communities, but rather the reverse (we should mark -180,000 ha instead). The intention is that the farmers will produce pro-poor crops such as jatropha on the former waste-land.

Crops

Jatropha.

Concerns

According to Ariza-Montobbio, large farmers have more advantages of the jatropha schemes than small farmers, amongst others because of relatively lower yields and higher practical entry barriers.

Literature

- Ariza Montobbio et al., 2010, The political ecology of Jatropha plantations for biodiesel in Tamil Nadu, India, *Journal of Peasant Studies*, 37(4): 875–897.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #641	India	Government	2,000,000	Jatropha	Unknown	-
Ecofys assessment:			0	Jatropha	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/india/641>

Data quality

ILC refers to Ariza-Montobbio [2010] which mentions plans for 2,000,000 ha jatropha in a footnote.

Analysis of entry

Ariza-Montobbio describes the distribution of wasteland to the rural poor as a model of Jatropha promotion. As part of a National Watershed Development Program for Rainfed Areas (NWDPR), launched in 1990-91, about 2 Mha of wasteland would be transferred to eligible small farmers and landless households in Andhra Pradesh (this entry), about 150,000 ha in Karnataka (see ILC #642), about 180,000 ha in Kerala (ILC #640) and about 100,000 ha in Tamil Nadu (see ILC #631).

Although this can be seen as a land deal, we will mark it as 0 ha, because it does not constitute land taken from communities, but rather the reverse (we should mark -2,000,000 ha instead). The intention is that the farmers will produce pro-poor crops such as jatropha on the former waste-land.

Crops

Jatropha.

Concerns

According to Ariza-Montobbio, large farmers have more advantages of the jatropha schemes than small farmers, amongst others because of relatively lower yields and higher practical entry barriers.

Literature

- Ariza Montobbio et al., 2010, The political ecology of Jatropha plantations for biodiesel in Tamil Nadu, India, Journal of Peasant Studies, 37(4): 875–897.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #642	India	Government	150,000	Jatropha	Unknown	-
Ecofys assessment:			0	Jatropha	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/india/642>

Data quality

ILC refers to Ariza-Montobbio [2010] which mentions plans for 150,000 ha jatropha in a footnote.

Analysis of entry

Ariza-Montobbio describes the distribution of wasteland to the rural poor as a model of Jatropha promotion. As part of a National Watershed Development Program for Rainfed Areas (NWDPR), launched in 1990-91, about 2 Mha of wasteland would be transferred to eligible small farmers and landless households in Andhra Pradesh (see ILC #641), about 150,000 ha in Karnataka (this entry), about 180,000 ha in Kerala (ILC #640) and about 100,000 ha in Tamil Nadu (see ILC #631).

Although this can be seen as a land deal, we will mark it as 0 ha, because it does not constitute land taken from communities, but rather the reverse (we should mark -150,000 ha instead). The intention is that the farmers will produce pro-poor crops such as jatropha on the former waste-land.

Crops

Jatropha.

Concerns

According to Ariza-Montobbio, large farmers have more advantages of the jatropha schemes than small farmers, amongst others because of relatively lower yields and higher practical entry barriers.

Literature

- Ariza Montobbio et al., 2010, The political ecology of Jatropha plantations for biodiesel in Tamil Nadu, India, *Journal of Peasant Studies*, 37(4): 875–897.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #735	Argentina	Douglas Tompkins	270,000	Unknown	Unknown	-
Ecofys assessment:			179,000	No crops	<2000	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/argentina/735>

Data quality

The entry is based on press articles [Parlamentario 2011, Oberle 2010 and Goni 2007] and a blog on Landfarmgrab [Aranda 2011] on the land owned by Douglas Tompkins in Argentina. The 270,000 ha are mentioned only by Aranda, who does not provide any source. Oberlé does not provide figures on the land owned by Tompkins. Goni refers to about 179,000 located in the Ibera wetland.

Analysis of entry

Douglas Tompkins is a US American multimillionaire who believes in deep ecology. His foundation "The Conservation Land Trust" (CLT), has acquired land in the Ibero wetland since the late 1990's for conservation purposes. The extension mentioned on the CLT website is consistent with the data from Goni. CLT indicates that the land is used for biodiversity conservation and ecological agriculture.

Crops

Mainly nature conservation.

Concerns

Conflicts with local population for access to water, loss of agricultural land, landownership concentration [Murmis and Murmis 2011 and Goni 2010]. Positive effects on biodiversity.

Literature

- Goni, 2011. The Ugly American Environmentalist. In: Time, 1 March 2007. <http://www.time.com/time/world/article/0,8599,1595221,00.html>.
- Arana, 2011. Blog: Soja si, indígenas no, <http://farmlandgrab.org/post/view/18533>.
- Conservation Land Trust (CLT), Projects in Argentina, <http://www.theconservationlandtrust.org>
- Murmis and Murmis, 2011. Acaparamiento de tierras - Estudios de 17 países de América Latina y el Caribe: El caso de Argentina, <http://www.rlc.fao.org/es/prensa/noticias/estudio-de-la-fao-halla-intensos-procesos-de-concentracion-y-extranjerizacion-de-tierras-en-america-latina-y-el-caribe/>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #762	Brazil	Unknown	491,437	Sugar cane	Unknown	-
Ecofys assessment:			211,032	Unknown	<2007	Generic concerns
			226,920		2007-2008	
			53,485		2009-2010	

Source

<http://landportal.info/landmatrix/get-the-detail/south-east-asia/brazil/762>

Data quality

ILC refers to Vaz [2010] which mentions the acreage and suggests cane as a crop.

Analysis of entry

Vaz mentions the acreage as rural land owned by foreigners in the Sao Paulo state. The article is based on an unpublished report from the National Institute of Colonization and Agrarian Reform (Instituto Nacional de Colonização e Reforma Agrária - INCRA) on land acquisition by foreigners in Brazil. A similar figure can be found in a publication from the Brazilian Senate [Santana et al. 2012] and from Sauer and Leite [2011] based on data from the National Rural Registration System (SNCR) administrated by INCRA. Both, Santana [2012] and Sauer and Leite [2011], indicate that the around 491,000 ha was the total rural area owned by foreigners in 2010. According to Sauer and Leite [2011], 53,485 ha were acquired between 2008 and 2010 and 226,920 ha between 2007 and 2008.

The 491,000 ha refer to multiple deals. Sauer and Leite indicate that the 491,437 ha consists of 12,291 properties. The 53,485 ha acquired between 2008 and 2010 consist of 89 rural properties.

Crops

We could not find any confirmation that this area has been used for sugar cane. It is quite possible that at least part of the area reported by ILC has been used for sugar cane. The sugar cane cultivated area in Sao Paulo state increased dramatically over the past decade, more than for any other crop. However, we assume the acreage mainly includes non-agricultural properties, especially since the average size of each property is only 40 ha.

Concerns

Strong increase in the land value compared to national average [Sauer and Leite 2011] which have negative impacts on agrarian reform. Re-concentration of property in areas that were already subject to agrarian reform is also observed [Fernandez cited by Borrás et al. 2010].

Literature

- Vaz, L, 2010. Mais de 4 milhões de hectares nas mãos de estrangeiros (More than 4 million ha in hands of foreigners). <http://www.gvces.com.br> or <http://oppa.net.br/clipping.php>
- Borras et al. 2010, The politics of biofuels, land and agrarian change: editors' introduction. In: *The Journal of Peasant Studies* 37(4):575–592.
- Canab, 2008, Acompanhamento da safra brasileira: Graos. Safra 2008/2009 (Monitoring of the Brazilian harvest: grains; Harvest 2008/2009) <http://www.conab.gov.br/>
- Canab, 2011, Acompanhamento da safra brasileira: Graos. Safra 2010/2011 Monitoring of the Brazilian harvest: grains; Harvest 2010/2011). <http://www.conab.gov.br/>
- Canasat, 2013, Sugarcane crop monitoring in Brazil by Earth observing satellite images. Retrieved on February 2013 <http://www.dsr.inpe.br/laf/canasat/en/tables.html>
- Santana, F., 2012. Aquisição de terras por estrangeiros no Brasil : Uma Avaliação Jurídica e Econômica (Acquisition of land by foreigners in Brazil: A Legal and Economic Assessment). *Textos para Discussão* 114. www.senado.gov.br/conleg/nepsf1.html
- Sauer and Leite, 2011. Agrarian structure, foreign land ownership, and land value in Brazil. Paper presented at the International Conference on Global Land Grabbing 6-8 April 2011.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #763	Brazil	Unknown	800,000	Sugar cane	Unknown	-
Ecofys assessment:			0	n/a	No deal	Sincere concerns

Source

<http://landportal.info/landmatrix/get-the-detail/763>

Data quality

ILC refers to Survival International [2010] which quotes the Secretary for Agrarian Development about 50 ethanol project plans that “threaten to occupy 800,000 ha in the next few years”.

Analysis of entry

We could not find Survival’s source nor any other source confirming the deals. Statistics on sugar cane acreage in Mato Grosso do Sul confirm a significant growth in the sugar cane area in the last five years. The area cultivated with sugar cane in Mato Grosso do Sul increased from 310,000 ha in 2008/2009 to 650,000 ha in 2012/2013 (Canasat, 2013), thus an increase of 345,000 ha between 2008/2009 and 2012. While this is an indicator of potential deals, we have not found any evidence that the acreage was indeed the result of new closed deals on land previously owned by communities.

Crops

Sugar cane

Concerns

There are regular conflicts in Mato Grosso do Sul between indigenous people- and the non-indigenous farmers the government parcelled the land to (in the last century; before 1988). Recent land deals might have exacerbated these conflicts, in the cases where the concerns of customary users were not sufficiently consulted [Survival International 2010; Amnesty International, 2012; Anaya 2009].

Literature

- Survival International, 2010, Violations of the rights of the Guarani of Mato Grosso do Sul state.
- Amnesty international, 2012. Land Grabbing: Schmutziges Geschäft mit Ethanol.
<http://www.amnesty.ch/de/aktuell/magazin/2012-4/land-grabbing--ethanol-brasilien>
- Anaya, J., 2009. Report of the Special Rapporteur on the situation of human rights and fundamental freedoms of indigenous people. Report on the situation of human rights of indigenous peoples in Brazil. United Nations. Human Rights Council.
- Canasat, 2013, Sugarcane crop monitoring in Brazil by Earth observing satellite images. Retrieved on February 2013 <http://www.dsr.inpe.br/laf/canasat/en/tables.html>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #833	Guatemala	Bionor	10,000	Jatropha, Oil palm	2007	-
Ecofys assessment:			517	Jatropha	2007	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/833>

Data quality

ILC refers to a report by Action Aid [Borelo et al. 2010] which contains a map with different deals and the range of the deals – not the exact extension.

Analysis of entry

The deal in Guatemala by the company Bionor is marked with up to 10,000 ha. The company website of Bionor [2013] explain that they have 517 ha of jatropha plantation in Guatemala.

Crops

Jatropha.

Concerns

No concerns found specific for this entry.

Literature

- Bionor, 2013. Retrieved in February 2013. <http://www.bionor.es/eng/bionor.aspx>
- Borelo et al, 2010. Chi paga il prezzo dei carburanti verdi (Who pays the price of green fuels?). Commissioned by Action Aid.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #834	Guatemala	Hame	40,000	Oil palm	Unknown	-
Ecofys assessment:			40,000	Oil palm	2008	Land grab

Source

<http://landportal.info/landmatrix/get-the-detail/834>

Data quality

None of the sources included in the ILC database directly mentions the 40,000 ha. They focus on the expansion of sugar cane and palm oil plantations in Guatemala, including the expansion in the Petén region by Hame Group.

Analysis of entry

The 40,000 ha can be traced back to a report from the NGO Action Aid [Solano, 2010], which actually in-turn refers to a press article about Guatemalan agricultural exports [Ortiz, 2008] which does not refer to a particular land deal and does not provide any sources. Solano (2010) refers to 32,000 ha oil palm plantations owned by the Hame Group and indicates that this group might have extended the oil palm area to 40,000 ha in 2008. Hame Group does not seem to have internet presence.

Crops

Oil palm.

Concerns

There are many concerns in the Petén province and its surroundings connected to the expansion of sugar cane and oil palm plantations. Some articles and posts mention the company directly [Scientific American 2012]. Alonso [2012] reports unfair land deals and eviction, particularly in the Petén province. FIAN et al. [2010] and Haddock [2012] document cases in the municipality of Sayaxché in Petén (where the Hame group has several farms) in which peasants who refused to sell their land parcels are virtually confined by palm plantations and have limited access to their land and to road access.

Literature

- Solano, 2010. El mercado de los agrocombustibles: Destino de la producción de caña de azúcar y palma africana de Guatemala (The biofuels market: destination of the Guatemalan sugar (cane) and (oil) palm). Commissioned by Action Aid.
<http://www.actionaid.org/es/guatemala/publications/el-mercado-de-los-agrocombustibles-version-completa>.

- Scientific American, 2012, Biofuels Land Grab: Guatemala's Farmers Lose Plots and Prosperity to "Energy Independence".
- FIAN International et al. (2010). El Derecho a la Alimentación en Guatemala: Informe Final de la Misión Internacional de Verificación (The Right to Food in Guatemala: report of the international verification mission) <http://www.fian.org/en/library/publication/detail/the-right-to-food-in-guatemala/ea1ac1f4a38237a5529ff16d754d66a1/>
- Haddok, 2012. Biofuels Land Grab: Guatemala's Farmers Lose Plots and Prosperity to "Energy Independence". In: Scientific American, 13 January 2012. <http://www.scientificamerican.com/article.cfm?id=biofuels-land-grab-guatemala&print=true>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #835	Guatemala	Indesa	5,688	Oil palm	Unknown	-
Ecofys assessment:			6,500	Oil palm	1998-2008	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/835>

Data quality

ILC provides reference to an NGO website posting which does mention Indesa, but not the acreage.

Analysis of entry

Alonso Fradejas et al [2008] refers to 6,500 ha owned by INDESA, of which 5,000 are productive plantations in 2008. Additional 200 ha would be cultivated under the "productive alliance" model, which consist of long term lease contracts. The plantations are located in the municipalities of El Estor and Mariscos in the province of Izabál and Panzós in the province of Alta Verapáz.

Crops

Oil palm.

Concerns

According to ActionAid [Hurtado 2008], recent land acquisition processes carried out by INDESA put much of the risks by parcel owners who sell their parcel to Indesa.

Literature

- Alonso Fradejas et al. 2008. Caña de azúcar y palma africana: combustibles para un nuevo ciclo de acumulación y dominio en Guatemala (Sugar cane and African palm: fuel for a new cycle of accumulation and domination in Guatemala). <http://www.congcoop.org.gt/publicaciones/49-cana-de-azucar-y-palma-africana-combustibles-para-un-nuevo-ciclo-de-acumulacion-y-dominio-en-guatemala.html>.
- Hurtado, 2008. Plantations for agro fuels and loss of lands for the production of food in Guatemala. Action Aid. <http://www.actionaid.org/es/guatemala/publications/plantaciones-para-agrocombustibles-y-la-p%C3%A9rdida-de-tierras>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1012	Russia	Inteko-Agro	250,000	Rapeseed	Unknown	-
Ecofys assessment:			250,000	Unknown	2008	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1012>

Data quality

ILC refers to Visser and Spoor [2010] who only mention that Inteko doubled their acreage to 250,000 ha in 2008. The second reference is a newspaper article by the Moskauer Deutsche Zeitung [2005] about complications between Inteko and the Belgorod Oblast government (south-west Russia).

Analysis of entry

There are a few sources that seem to confirm that Inteko-Agro has a land bank of 250,000 hectares, although only 50,000 – 72,000 hectares are under development.

Crops

The crop could not be confirmed by any source.

Concerns

According to whistle-blower site Russian Mafia, Inteko is involved in shadowy business and land speculation in the Belgorod region.

Literature

- Visser O, Spoor M, 2010, Land grabbing in Eastern Europe, http://ageconsearch.umn.edu/bitstream/95314/2/Visser-Land_grabbing_in_Eastern_Europe-238.pdf.
- Russian Maffia, <http://rumafia.com>.



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1016	Russia	Black Earth	323,000	Corn, rapeseed, sunflower	Unknown	-
Ecofys assessment:			318,000	Wheat, sunflower seeds, rapeseed, barley, corn, soybean	2006-2011	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1016>

Data quality

ILC refers to a very positive post by Farmlandgrab which mentions that Black Earth Farming has 330,000 hectares of farmland in southern Russia. Further reference is made to two articles both by Visser and Spoor (2010 and 2011) which mention the 323,000 ha. More information is not available from these sources.

Analysis of entry

On the company's website a graph is given of the land under control by Black Earth Farming, which slightly varied in recent years; Black Earth Farming had a total land bank under control amounting to 318,000 hectares as of 31 December 2011. 260 thousand hectares or 82% of total land under control is in full ownership.

Crops

Wheat 47% of harvest area, barley 12%, corn 3%, sunflower seeds 20%, rapeseed 15%, soybeans 3% [company website].

Concerns

We have not found any concerns.

Literature

- Visser O and Spoor M, 2011, Land grabbing in post-Soviet Eurasia: the world's largest agricultural land reserves at stake, The Journal of Peasant Studies 38(2).
- Kandell, 2009, Betting on the Russian farm, farmlandgrab.org.
- Black Earth Farming company's website: <http://blackearthfarming.com/assetbase.html>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1017	Russia	Razgulay	217,000	Barley, rice, sugar beet	Unknown	-
Ecofys assessment:			500,000	Wheat, sugar beet, rice, ...	Unknown	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1017>

Data quality

ILC refers to a prospectus on investments in emerging markets [Nomura 2008], which contains a extensive factsheet on Razgulay.

Analysis of entry

According to homepage, Razgulay has 500,000 ha under control (March 2013), including 380,000 ha currently being used. A large part of the land bank results from past acquisitions of land banks that were already owned by others. We assume that most of the land was acquired from individual farmers over a long period.

Crops

According to their homepage, Razgulay currently (March 2013) have winter and spring wheat (120,000 ha), sugar beet (55,000 ha), rice (15,000 ha), soy (16,000 ha), sunflower (20,000 ha), flax (13,000 ha). "In addition, the farm fields of agricultural holding will be sown with barley, corn, buckwheat, peas, and a variety of annual and perennial grasses."

Concerns

No concerns found.

Literature

- Nomura Securities, 2008, Agriculture – global emerging markets, <http://farmlandgrab.org/wp-content/uploads/2009/05/20081027-agriculture-richard-ferguson.pdf>
- Razgulay company homepage, <http://www.raz.ru>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1049	Ukraine	Kernel	180,579	Barley, corn, sunflower	Unknown	-
Ecofys assessment:			210,000 120,000	Wheat, barley, maize	≤ 2011 2012-2013	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1049>

Data quality

ILC refers to a prospectus on investments in emerging markets [Nomura 2008], which contains a extensive factsheet on Kernel.

Analysis of entry

According to their 2011 annual report, Kernel leased 210,000 ha of prime farm land in October 2011. According to homepage, Kernel currently (March 2013) manages over 330,000 ha of prime farm land. At least part of the land results from acquisitions of other farming companies.

Crops

According to their website, Kernel typically use up to one-third of the acreage for wheat, and from 10 to 15% each of barley, corn, soybean, rapeseed and sunflower.

Concerns

No concerns found.

Literature

- Kernel company homepage and 2011 annual report, <http://www.kernel.ua>
- Nomura Securities, 2008, Agriculture – global emerging markets, <http://farmlandgrab.org/wp-content/uploads/2009/05/20081027-agriculture-richard-ferguson.pdf>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1051	Ukraine	Mriya	240,000	Corn, potatoes, rapeseed	Unknown	-
Ecofys assessment:			298,000	Wheat, rapeseed, maize	Unknown	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1051>

Data quality

ILC refers to a PAN AP report and to the company website of Mriya, which present different acreages.

Analysis of entry

PAN AP [2010] mentions that Mriya Agro Holding is (soon) to increase their landholdings to 165,000 ha. The company website mentions that they have 298k ha of land under management in Western Ukraine as of December 2012.

Crops

Crop mix on area basis is currently 56% winter wheat, 16% winter rapeseed, 12% corn, 11% sugar beet, 2% potatoes and 3% other crops [Mriya 2013].

Concerns

No concerns found. Mriya notes on their website that they are funded partially by IFC. They do present an environmental and social review of their activities.

Literature

- PAN AP, Pesticide Action Network Asia and the Pacific, 2010, Global Land Grabbing, Eroding Food Sovereignty, http://www.panap.net/sites/default/files/TurningPoint_GlobalLandGrabbing.pdf
- Mriya, 2013, Management presentation March 2013, <http://www.mriya.net>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1054	Argentina	Heilongjiang	330,000	Corn, soy, wheat	Unknown	-
Ecofys assessment:			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/1054>

Data quality

The entry is based on an article in the magazine America Economia [2011], a short description of the project in a book on natural resources [OCRN 2010] and on the website of the Chinese company Heilongjiang which is connected to the entry. The agreement between Heilongjiang and the Argentinian government can be retrieved from the website of the Grupo de Reflexión Rural (GRR 2010).

Analysis of entry

The Chinese company is to invest 1.5 billion USD to develop farms in Argentinian Patagonia, on 300,000 ha of land that is "currently not being used". The Chinese company will buy the product of these lands for a period of 20 years. No land is actually being bought [America Economia 2011]. The government will lease land to farmers that commit to sell the product exclusively to Heilongjiang Beidahuang. The Chinese company has the last word regarding the crops that will be produced.

Crops

Wheat, corn, soybeans, fruit and vegetables. Local activists fear that the focus will be on soy.

Concerns

There is much controversy around the deal. There is local resistance due to the lack of transparency (the deal was only announced after it was already closed, local stakeholders were not involved), there are concerns over water, land use change, soy monocultures and displacement of current activities. The subsidies awarded to the investor are strongly criticised [Carabellese 2011]

Literature

- America Economía, 2011. Mayor productora de alimentos de China invertirá US\$1.500M en la Patagonia argentina. 28 August 2011. <http://www.americaeconomia.com/negocios-industrias/empresa-china-invertira-us1500m-para-habilitar-tierras-ociosas-en-argentina>;
- OCRN, 2010. Anuario del Observatorio de Conflictos por los Recursos Naturales, www.biodiversidadla.org/content/download/80395/463876/version/1/file/El+libro+verde+del+O+CRN+2010.pdf
- Heilongjiang Beidahuang State Farms Business Trade, 2011. Press release 28 August 2011. www.bdtrade.com%2FShowp.asp%3FID%3D1377;

- Grupo de reflexion rural (GRR), 2011. Denuncia penal. Retrieved in February 2013, <http://www.grr.org.ar/rionegro-china/>.



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1060	Argentina	Ecodesarrollo Salta	316,718	Soy	Unknown	-
Ecofys assessment:			362,000	Unknown	2001	Small concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1060>

Data quality

ILC provides one (working) link to an opinion blog on Taringa [2010]. The information basis is very thin.

Analysis of entry

Taringa mentions that the Olmedo family was given 362,000 ha by the Romero government in 2001. In June 2010 a law was passed that changed the concession on this land. In 2003, Ecodesarrollo turned over 132,000 ha of the land to Cresud, an Argentine agricultural company, under apparently disputed conditions.

Crops

Unknown.

Concerns

Environmental concerns.

Literature

- <http://www.taringa.net/posts/info/7619518/Que-le-parece-si-empezamos-por-casa-diputado-Olmedo.html>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1070	Argentina	Al-Khorayef	200,000	Sorghum, wheat	Unknown	-
Ecofys assessment:			200,000	Unknown	2011	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1070>

Data quality

ILC refers to a blog and several press articles, which are based on declarations of the governor of the Chaco province in Argentina. The deal is better documented in Greenpeace [2012], Murmis and Murmis [2011], Asociación Espacio [2012] and Gobierno del Chaco [2012].

Analysis of entry

In February 2011, with the Saudi Group Al-Khorayef signed an agreement with the El Chaco government to invest 400 million USD in irrigation and infrastructure in the region "El Impenetrable". The investment would allow for developing, over a period of 13 years, 200,000 ha of state owned land [Greenpeace, 2012; Asociación Espacio, 2012] .

In March 2012, the provincial government amended the deal to foresee that the land is exploited by the state company COFOR to produce agricultural, animal and forestry products. The present role of Al-Khorayef is unclear.

Crops

Unknown. The deal includes agriculture, forestry and cattle.

Concerns

"El Impenetrable" covers about 4 million hectares of native forests in the semi-arid Chaco region, located mainly in the northwest of the province of Chaco. Greenpeace [2012] indicates that the region is inhabited by around 60,000 people, most of them indigenous, peasants and small farmers. Greenpeace's main concern is that the deal induces further deforestation, which would affect subsistence activities of indigenous people.

Literature

- Greenpeace, 2012. "El Impenetrable" en peligro" El avance de la ganadería intensiva pone en riesgo a los últimos bosques chaqueños, <http://www.greenpeace.org/argentina/es/noticias/Greenpeace-denuncia-que-Chaco-viola-la-Ley-de-Bosques/>

- Murmis and Murmis, 2011. Acaparamiento de tierras - Estudios de 17 países de América Latina y el Caribe: El caso de Argentina. <http://www.rlc.fao.org/es/prensa/noticias/estudio-de-la-fao-halla-intensos-procesos-de-concentracion-y-extranjerizacion-de-tierras-en-america-latina-y-el-caribe/>
- Gobierno del Chaco, 2012. AGENDA OFICIAL DEL 13.03.12. www.prensa.chaco.gov.ar
- Asociación Espacio, 2012. Piden a diputados revisar cesión de tierras a Al-Khorayef. In: Diario El Chaco, 30 March 2012 <http://diariochaco.com/noticia/138499/Piden-a-diputados-revisar-cesion-de-tierras-a-Al-Khorayef.html>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1106	Benin	Unknown	350,000	Unknown	Unknown	-
Ecofys assessment:			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/1106>

Data quality

The sources cited by ILC (see below) do not provide any useful information to understand this entry.

Analysis of entry

No evidence can be found of any deal. We assume that this entry largely overlaps with ILC #1122.

Crops

Not applicable.

Concerns

Not applicable.

Literature

- Global Food Security and Sovereignty Threatened by Corporate and government government "Land Grabs" in Poor Countries", by Oakland Institute, 2010
- Report: Global food security and sovereignty threatened by corporate and government "land grabs" in poor countries, 24 August 2010, <http://farmlandgrab.org/post/view/14979>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1115	Benin	Green Waves	250,000	Sun Flower	Unknown	-
Ecofys assessment:			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/1115>

Data quality

ILC provides a few sources that syndicate rumours about this supposed deal. The evidence base is very thin.

Analysis of entry

Most notably the report by UN special rapporteur on the right to food, Olivier de Schutter, mentions that "The Italian company Green Waves has reportedly secured the exploitation of 250,000 hectares for sunflower cultivation". However, we could not find any evidence for this deal, only rumours. We could not find any information about this company Green Waves. For a 200 kha project of this kind, that surfaced almost 6 years ago, there is strikingly little information in the public domain. We assume this is not a project.

Crops

Not applicable

Concerns

It is feared that production of biofuel crops will compete with food production in the prime agricultural lands of Benin. A further concern is that industrial companies will be supported to obtain land at the expense of small-scale farmers.

Literature

- UN 2009 - UN-Report of the Special Rapporteur on the right to food, Olivier De Schutter, on his mission to Benin (12–20 March 2009), http://www.srfood.org/images/stories/pdf/officialreports/20100305_a-hrc-13-33-add3_country-mission-benin_en.pdf

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1122	Benin	Unknown	300,000	Oil palm	Unknown	-
Ecofys assessment:			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/1122>

Data quality

ILC provides sources that do not provide any details or evidence about this entry.

Analysis of entry

No evidence can be found of any specific deal of this size in Benin. Benin's so called "Agricultural Revival Programme" (part of the IMF restructuring programme for Benin) is set to entail significant palm oil developments as the scaling up of biodiesel from jatropha, peanuts, and bioethanol from sugarcane, manioc and other crops. The Benin Government aims to find 300,000 to 400,000 ha of land in the Southern Benin areas of Oueme, Plateau, Atlantic, Mono, Couffo and Zou for the production of palm oil. Various industrial groups from Malaysia and South Africa have reportedly made visits to Benin to assess the opportunities to grow biofuels.

Crops

Not applicable.

Concerns

There are concerns over food security as 50% of the Benin's population live in the southern zone on only 7.7% of the national territory. It is feared that production of biofuel crops will compete with food production in the prime agricultural lands of Benin. A further concern is that industrial companies will be supported to obtain land at the expense of small-scale farmers.

Literature

- African Biodiversity Network, Agrofuels in Africa, The impacts on Land, Food and Forests, Case studies from Benin, Tanzania, Uganda and Zambia, July 2007, http://www.biofuelwatch.org.uk/docs/ABN_Agro.pdf
- Report of the Special Rapporteur on the right to food, Oliver De Schutter, 2009, Mission to Benin
- Bénin : Des terres cultivables bradées à des groupes financiers étrangers (Benin: arable land sold off to foreign financial groups), 15 June 2010, <http://www.farmlandgrab.org/post/view/13717>;
- Achat/accaparement des terres en Afrique: Opportunités ou menaces? Cas du Bénin en Afrique de, http://www.fondation-farm.org/IMG/pdf/foncier_benin.pdf



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1153	Cameroon	Group Bolloré	58,000	Unknown	Unknown	-
Ecofys assessment:			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/1153>

Data quality

The references given by ILC do not give any information on this initiative.

Analysis of entry

Additional research reveals that in 2005, subsidiaries of the Bolloré group established a pilot biofuels program in Cameroon, of only “100 m3 per year”. This is either a tiny pilot or the correct number is incorrectly cited by media.

Bolloré group controls more than 80% of the palm oil production in Cameroon via Socapalm, which involve 78 kha plantations. These plantations already existed for several decades but were privatised and bought by Bolloré in 2000. This entry should not be considered as a land deal – at least not one that changes the land use rights of local people.

Crops

Presumably oil palm.

Concerns

Socapalm receives strong critique on social and environmental aspects [Sherpa 2010]. The initial creation of the plantation (by the state) seems to have involved land grabbing.

Literature

- Sherpa, 2010, The Impact of the Privatization of SOCAPALM on Communities and the Environment in Cameroon, http://www.rightsforpeople.org/IMG/pdf/briefing_paper_-_socapalm.pdf



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1157	Cameroon	CDC	102,000	Banana, oil palm, rubber	Unknown	-
Ecofys assessment:			14,000	Banana, oil palm, rubber	2011	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1157>

Data quality

ILC does not provide any source for this entry.

Analysis of entry

CDC (Cameroon Development Corporation), created in 1947, operates 41 kha of plantations within 79 kha of concessions. It is not publicly recorded how this acreage has developed over time. CDC is currently (2011-2013) extending its operations with 14 kha, it is not clear if this extension is taking place within the existing concession.

Crops

Banana, oil palm, rubber.

Concerns

No concerns found.

Literature

- <http://www.cdc-cameroon.com/>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1160	Congo	Magindustries	68,000	Eucalyptus	Unknown	-
Ecofys assessment:			68,000	Eucalyptus	1999-2001	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1160>

Data quality

ILC provides useful references.

Analysis of entry

Both the ILC source as the company's website mentions 68,000 ha owned by MAGForestry for commercial eucalyptus plantation. This should not be marked as a recent land deal, as it concerns the acquisition of all the shares of Eucalyptus Fibre Congo, created by Shell Renewables between 1999 and 2001 [World Rainforest Movement 2007].

Crops

According to the company website, the eucalyptus is delivered to global pulp and paper and fibreboard industry.

Concerns

No concerns found.

Literature

- Profundo 2010, German Investment funds involved in land grabbing, http://farmlandgrab.org/wp-content/uploads/2010/11/1011_FIAN_Profundo_Landgrabbing.pdf
- MAG industries company website: <http://www.magindustries.com/innerpage.aspx?pageid=12>
- World Rainforest Movement, 2007, Congo, Republic, Thousands of hectares of land for eucalyptus, oil palm and mining.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1164	Congo	ENI	70,000	Oil palm	Unknown	-
Ecofys assessment:			70,000	Oil palm	2005	Strong concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1164>

Data quality

Analysis of entry

Several sources, including a press release by the company itself, mention that Italian energy company ENI achieved access to some 70,000 hectares of land for planting oil palm. Out of the ENI press release: "Activities will start in the Niari region with approximately 70,000 now unfarmed hectares expected to produce approximately 340,000 tons/year of crude palm oil. This will cover Congo's food requirements and will lead to the production of 250,000 tons/year of bio-diesel. The project will employ approximately 10,000 people and have an immediate impact on the development of local agriculture."

Crops

Oil palm.

Concerns

In WRM's bulletin 149 the following concerns are given: "None of the agreements signed between Eni and the Congolese government are publicly available, while research by Congolese human rights organizations has revealed an almost total lack of public awareness of the investments. There has been no meaningful engagement by Eni or by the government with local communities about the projects' potential social and environmental impacts. This contradicts the company's own environmental and human rights policies, and violates the government's duty to protect its citizens."

Literature

- ENI press release, ENI-The food plus biodiesel project, <http://www.eni.com/attachments/media/press-release/2008/05/congo-19may-08-eng/ProgettoFoodPlusBiodieselENG.pdf>
- World Rainforest Movement 2010 - Oil Palm in Africa, past, present and future scenarios
- WRM's bulletin N°; 149 December 2009

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1167	Congo	Agri SA	200,000	Cereals, Rice, Soybean	Unknown	-
Ecofys assessment:			88,000	Tropical fruit	2009	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1167>

Data quality

ILC provides several references that give some details.

Analysis of entry

In 2009 there were several news items that AgriSA had been offered as much as 10 million hectares of land to farm in the Republic of Congo . According to the Guardian of 1 May 2011, the first contract for 88,000 ha were signed a month earlier. Grain 2012 mentions a contract of 80,000 ha.

Crops

Tropical fruit

Concerns

There are generic concerns that fruit is produced for export, rather than staple food for domestic consumption. Another concern is that Agri SA will use land that seems not to be empty but occupied by farmers and pastoralists [The Guardian, 1 May 2011].

Literature

- The Guardian, 1 May 2011, South Africa's white farmers are moving further north (<http://farmlandgrab.org/post/view/18538>)
- Grain 2012, Who's behind the land grabs (<http://farmlandgrab.org/post/view/21173>).

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1205	Ethiopia	Karuturi	300,000	Oil pam , rice, roses	Unknown	-
Ecofys assessment:			100,000	Maize, oil palm, sugar cane, rice	2008	Land grab

Source

<http://landportal.info/landmatrix/get-the-detail/1205>

Data quality

ILC provides useful sources.

Analysis of entry

In 2008 Karuturi Global Limited (Karuturi) of India acquired 300,000 ha for agricultural production in the Gambela region on a 99 year lease. The deal was one of the first major land deals in Ethiopia and was negotiated directly between Karuturi and the Gambela Regional Government, rather than the Federal Government.

From 2009 the Federal Government took over responsibility for all land deals greater than 5,000 ha and the original land agreement negotiated was renegotiated. A new agreement with the Federal Government was signed on 25 October 2010, and reduced the land concession to 100,000 ha on a 50 year lease term. An additional 200,000 ha was available to Karuturi provided that they developed the original 100,000 ha within two years.

Karuturi is publicly maintaining that it still has an option on an additional 200,000 ha. Based on activities developed so far, it is considered unlikely that Katuri will be able to take the option. Karuturi also owns rights to develop a further 11,700 ha in the Bako region for maize cultivation and is the largest rose grower in Africa.

Crops

There is some inconsistency regarding which crops are being cultivated. The Karuturi 2008/2009 Annual Report indicates that the 100,000 ha would be based on cereal crops and oilseeds (70,000 ha), oil palm (20,000 ha) and sugar cane (10,000 ha), while 2010 and 2011 press releases refer to the cultivation of cereal crops, oil palm, sugar cane and vegetables. Research by the ILC and Oakland Institute (OI) indicates that rice, oil palm, maize and sugar cane are currently being cultivated.

Concerns

Anywaa Survival Organisation (ASO) a London based NGO, and the Oakland Institute describe the the land deal as “[...] Ethiopia’s biggest land grab”. There are concerns over regional job creation. There are concerns with regard to environmental impacts, specifically the drainage of wetland areas and clearing of extensive forest cover without Environmental Impact Assessments. The land rent paid is very low, even to Ethiopian standards. There are several other strong socio-economic concerns.

On 18 May 2012 the U.S government denied allegations by Human Rights Watch and the OI that a resettlement program by Karuturi involved coercion and abuse.

Literature

- ILC, 2011, Messele Fisseha, A case study of the Bechara agricultural development project, Ethiopia, <http://www.landcoalition.org/publications/case-study-bechera-agricultural-development-project-ethiopia>
- Ethiopians say Indians grabbing land, Indian farmers claim it is official, 17 September 2010, <http://farmlandgrab.org/post/view/15602>
- Karuturi tractors make big splash On Bole Road, 28 October 2010, <http://farmlandgrab.org/post/view/16786>
- Ethiopian Government Slashes Karuturi Global Land Concession by Two-Thirds, <http://www.bloomberg.com/news/2011-05-04/ethiopian-government-slashes-karuturi-global-land-concession-by-two-thirds.html>
- Karuturi Annual Reports, http://www.karuturi.com/index.php?option=com_content&task=view&id=117&Itemid=136
- The Oakland Institute, Land Rent Contractual Agreement made between Ministry of Agriculture and Rural Development, 25 October 2010, <http://media.oaklandinstitute.org/sites/oaklandinstitute.org/files/Karuturi-Agreement.pdf>
- The Oakland Institute, Understanding Land Investment Deals in Africa, Country Report: Ethiopia, 2011, http://www.oaklandinstitute.org/sites/oaklandinstitute.org/files/OI_Ethiopa_Land_Investment_report.pdf

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1388	Liberia	Sime Darby	220,000	Oil palm, rubber	Unknown	-
Ecofys assessment:			180,000 40,000	Oil palm Rubber	2009	Strong concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1388>

Data quality

One reference provided by ILC gives a good starting point to understand this entry.

Analysis of entry

In 2009 Sime Darby signed a 63-year concession agreement with the Liberian government, covering 220,000 hectares in Bomi, Gbarpolu, Grand Cape Mount and Bong counties. Of the total concession area, 120,000 hectares was originally from an agreement with another Malaysian company (Guthrie Company) that did not go ahead. The remaining 100,000 hectares is provided to Sime Darby through the 2009 agreement (Carrere, 2010).

Crops

About 80% of the land (180,000 hectares) will be used to establish oil palm plantations, the remainder will be used for rubber plantations.

Concerns

Concerns raised about this project are significant and current, but heavily disputed by Sime Darby.

Sime Darby disputes the claims in several press releases, claiming that the civil society allegation of land grabbing was dropped. In a response to the FOE letter, the company states that when Sime Darby recognised issues with their processes in Liberia, they ceased operations in order to improve their stakeholder engagement processes. They now operate an improved process to seek Free, Prior, Informed Consent (FPIC) from local communities and claim to only develop those parts of the concession area where the local community permits.

Literature

- FOE letter 17 January 2013, http://www.simedarby.com/upload/Sime_Darby_Response_to_FOE_Allegations_Attachment_1_02.pdf
- Sime Darby response 31 January 2013: http://www.simedarby.com/Press_Release.aspx

- Statement and Declaration by affected community members, 29 November 2012:
<http://farmlandgrab.org/post/view/21381>
- Rights and Resources Initiative (RRI), 2012, "Turning Point: What future for forest peoples and resources in the emerging world order?" Available from:
<http://www.forestpeoples.org/topics/rights-land-natural-resources/news/2012/02/turning-point-what-future-forest-peoples-and-resou>
- Sime Darby press release 2012:
http://www.simedarby.com/False_and_Inaccurate_Reports_on_Liberian_Operations.aspx
- Sime Darby Liberia Plantation history:
http://www.simedarbyplantation.com/Sime_Darby_Plantation_in_Liberia.aspx
- Sime Darby RSPO membership: http://www.rspo.org/en/sime_darby
- Global Land Project (GLP), 2010, Land Grab in Africa: Emerging Land system drivers in a teleconnected world. Available from: http://farmlandgrab.org/wp-content/uploads/2010/08/GLP_report_01.pdf
- Sustainable Development Institute, Liberia: <http://sdiliberia.org/>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1396	Liberia	Golden Agri	240,000	Oil palm	Unknown	-
Ecofys assessment:			240,000	Oil palm	2010	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1396>

Data quality

-

Analysis of entry

Golder Veroleum (owned by the Verdant Fund LP, with Golden Agri Resources as major investor) announced on 16 August 2010 the signature of an Oil Palm Concession Agreement with the Liberian Government. The Agreement is to develop approximately 240,000 hectares oil palm (although the exact acreage differs per literature source: 40,000 – 260,000 hectares). The development will take place in the Southern Counties of Sinoe, Grand Kru and Maryland. Investment from the company is reported to be more than US\$1.6 billion dollars.

Crops

Oil palm

Concerns

The agreement includes a 40,000 ha smallholder programme. Direct employment related to the whole project is expected to exceed 35,000 jobs. No specific social concerns were found. Veroleum is a member of RSPO, which requires the company to commit to achieving a certain level of sustainability, although the company has not been certified to date.

Literature

- Golden Veroleum press release 16 August 2010: <http://www.veroleum.com/news-and-press-1/2010-08-16veroleumsigns>
- "Oil palm in Africa: Past, present and future scenarios" by Ricardo Carrere from Rain Forest Movement, 2010 http://wrm.org.uy/countries/Africa/Oil_Palm_in_Africa.pdf, www.commercialpressuresonland.org/research-papers/oil-palm-africa-past-present-and-future-scenarios-0
- Liberia: GOL, Golden Veroleum in US\$1.6bn negotiation (2010): farmlandgrab.org/10208



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1431	Madagascar	Madabeef	200,000	Unknown	Unknown	-
Ecofys assessment:			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/1431>

Data quality

Both sources provided by ILC give some information.

Analysis of entry

This entry concerns livestock, not crops

Crops

Not applicable.

Concerns

Not assessed.

Literature

- CIRAD, 2011, After Daewoo? Current status and perspectives of large-scale land acquisitions in Madagascar;
- GTZ, 2009, Foreign Direct Investment (FDI) in Land in Madagascar.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1455	Madagascar	UK Gem	452,500	Jatropha	Unknown	-
Ecofys assessment:			452,500	Jatropha	2005	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1455>

Data quality

ILC provides useful sources. Company website available.

Analysis of entry

UK company GEM BioFuels indicates on its website , that, starting in 2005 the company “has secured over 490,000 hectares of land and started establishing large Jatropha plantations across 200,000 hectares in the south west of Madagascar”. Further detail later indicates that “GEM BioFuels has entered into 18 agreements with Communes in relation to 452,500 hectares of land suitable for the establishment of plantations in Madagascar, which provide it with the exclusive right to establish Jatropha plantations on the land. To date approximately 55,700 hectares have been planted. In addition GEM BioFuels has an agreement in relation to 40,000 hectares containing natural forest, including significant numbers of mature wild Jatropha trees.”

Crops

Jatropha.

Concerns

GTZ indicates that 3,000-4,000 local farmers are employed. No social concerns were found. On the environmental side, GTZ indicates that no EIA has been conducted. ILC remarks that “the GEM project managed to negotiate land access without going through the State-Owned Land Administration”.

Literature

- ILC, 2011, “After Daewoo? Current status and perspectives of large-scale land acquisitions in Madagascar”. <http://www.landcoalition.org/publications/after-daewoo-current-status-and-perspectives-large-scale-land-acquisition-madagascar>
- GTZ, December 2009, “Foreign Direct Investment (FDI) in Land in Madagascar”. Available from: www2.gtz.de/wbf/4tDx9kw63gma/gtz2010-0063en-foreign-direct-investment-madagascar.pdf
- Company website, www.gembiofuels.com

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1458	Madagascar	Varun	465,000	Corn, lentils, rice	Unknown	-
Ecofys assessment:			0	Rice, maize, wheat	2009 Cancelled	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1458>

Data quality

ILC references provide a good starting point for research.

Analysis of entry

In March 2009, Le Monde wrote that Varun Industries (India) wanted to lease nearly 500,000 ha in Madagascar, in the regions Sofia (170,000 ha), Menabe (165,000 ha) and Atsinanana (100,000 ha). Varun wanted to grow rice (80%), corn and lentils, involving an investment of €1.5 billion over 10 years. According to GTZ 2009, the deal was smaller (total 231,911 ha) and fell in two parts:

1. Contract farming with 13 farmers' associations covering 170,914 ha of already-cultivated land
2. Contract with Malagasy Government for about 60,996 ha of unused state owned land

For the first part, the contract signed by 9 of the 13 farmers' associations, is publically available . GTZ indicates that there would be a procedure to receive the signature of the other 4 associations. However the day after the contract farming agreement was signed (27 January 2009), the political situation in the country changed and the projects were cancelled.

Crops

Rice, corn, wheat, pulses, fruits and other crops.

Concerns

Major concerns are reported about rushed public consultation and unfulfilled promises.

Literature

- Varun Industries: <http://www.varun.com/>
- ILC, 2011, After Daewoo? Current status and perspectives of large-scale land acquisitions in Madagascar, <http://www.landcoalition.org/publications/after-daewoo-current-status-and-perspectives-large-scale-land-acquisition-madagascar>
- GTZ, 2009, Foreign Direct Investment (FDI) in Land in Madagascar, <http://www2.gtz.de/wbf/4tDx9kw63gma/gtz2010-0063en-foreign-direct-investment-madagascar.pdf>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1742	Sudan	Citadel/Concord	105,000	Unknown	Unknown	-
Ecofys assessment:			105,000	Maize, sorghum	2009	Land grab

Source

<http://landportal.info/landmatrix/get-the-detail/1742>

Data quality

One of the ILC references is a relevant press release by the involved company.

Analysis of entry

In 2009, Citadel Capital, through a portfolio company Concord Agriculture (previously known as the Sudan Egyptian Agricultural Company (SEAC)), obtained a 25-year lease to 105,000 ha (250,000 feddans) of land in Gwit and Pariang counties of Unity State.

Crops

According to the company, they are planning to grow summer crops (maize and sorghum) for sale primarily for the local markets.

Concerns

According to Oakland Institute, the lease was signed without community involvement

Notes (only when really needed)

Literature

- http://www.oaklandinstitute.org/sites/oaklandinstitute.org/files/OI_country_report_south_sudan_1.pdf



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1750	Sudan		280,000	Unknown	Unknown	-
Ecofys assessment:			0	No crop	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/1750>

Data quality

ILC provides one useful source.

Analysis of entry

Norwegian People’s Aid [2011] explains that this entry involves the permanent expropriation to establish the Loile National Park. In return, the government plans to provide the community with certain services.

Crops

No crops, this concerns the establishment of a reserve for tourism and conservation.

Concerns

It is impossible to judge the quality of this deal.

Notes

We could not find any information about Loile National Park.

Literature

- Norwegian People’s Aid: The New Frontier -A baseline survey of large-scale land-based investment in Southern Sudan,
http://reliefweb.int/sites/reliefweb.int/files/resources/6F0B144DA275260B8525785C0069DB6A-Full_Report.pdf



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1754	Sudan	Eyat	162,000	Unknown	Unknown	-
Ecofys assessment:			0	n/a	n/a	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1754>

Data quality

ILC provides several references that are all based on a preliminary memorandum of understanding.

Analysis of entry

A negotiation started in 2010 and a preliminary memorandum of understanding (MOU) was made between the Sudanese Ministry of Agriculture and Forestry and the Eyat Oilfield Service Company. We have found no evidence that this intention materialised in a deal.

Crops

Unknown.

Concerns

The report by Norwegian People's Aid [2011] expresses generic concerns about relocations, without connection to the specific project.

Literature

- Norwegian People's Aid, 2011, The New Frontier, A baseline survey of large-scale land-based investment in Southern Sudan.

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1757	Sudan	Nile/Kinyeti	600,000	Jatropha	Unknown	-
Ecofys assessment:			0	Not decided	2008	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1757>

Data quality

Two of the three links provided by ILC do not work. The third link refers to a study by Norwegian People's Aid [2011] which describes the Nile project.

Analysis of entry

This is not yet a deal. In 2008, Nile Trading and Development closed a 600,000 hectare lease agreement, for 49 years, in South Sudan. Initially, the agreement involved forestry, agriculture and mining, with an apparent focus on jatropha. However, Nile has abandoned the plans for a biofuels project, as it became apparent that food production was a greater priority. The agreement is not a binding contract, it is rather a memorandum of understanding – consultations and negotiations have yet to start. Land ownership is still with the local communities. Currently, Kinyeti Development is the temporary executive agent for the lease agreement and is evaluating options for the commercial development of the land lease [personal communication 2012].

Crops

Not yet decided.

Concerns

Norwegian People's Aid notes that impacted people are not consulted and that several impacted counties reject the deal. On the other hand, no development has taken place yet, there is no lease contract yet and Kinyeti stresses that its objectives in South Sudan are centred on creating human-scale and profitable partnerships [personal communication 2012]. The company says it will give the local community a portion of the profits from the investment, increasing from 40 to 50% of net profits over the life of the lease [Norwegian People's Aid 2011]. Overall, we conclude that the concerns are of generic nature, and follow from the size of the ambition, rather than from real activities.

Literature

- Norwegian People's Aid, 2011, The New Frontier, A baseline survey of large-scale land-based investment in Southern Sudan, http://www.npaid.org/Media/20_Files/Development/New-Frontier

- Oakland institute, 2011, Land Deal Brief: Nile Trading and Development, Inc. in South Sudan (<http://www.oaklandinstitute.org/land-deal-brief-nile-trading-and-development-inc-south-sudan>);
- Personal communication, 2012, Hamelinck with Douglas, Director of Kinyeti.



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1759	Sudan	Green Resources	179,000	Unknown	Unknown	-
Ecofys assessment:			179,000	Forestry	2010	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1759>

Data quality

Links provided by ILC are broken. However, there is sufficient information on this initiative.

Analysis of entry

According to Norwegian People's Aid [2011], the regional government of Central Equatoria State in South Sudan decided to lease 179,000 hectare in Tindilo Payam (Terekeka County) to TreeFarms Sudan for the period of 99 years. TreeFarms Sudan is a Norwegian company, part of Green Resources. We could not confirm that the agreement has indeed be signed, but we assume so.

Crops

The company proposes to use 45,000 hectare for forest plantation (eucalyptus, teak, mahogany, and pine trees, fruit trees) and the remainder for forest conservation to generate carbon credits.

Concerns

There are some concerns about conflicts of interest of involved civil servants.

Literature

- Norwegian People's Aid, 2011, The New Frontier, A baseline survey of large-scale land-based investment in Southern Sudan, http://www.npaid.org/Media/20_Files/Development/New-Frontier
- Sudan Tribune, newspaper: <http://www.sudantribune.com/Review-of-South-Sudan-investment,38129> (assessed 18. Feb. 2013)

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #1904	Tanzania	Agrisol	219,800	Maize	Unknown	-
Ecofys assessment:			14,000	Maize, soy	2009	No concerns

Source

<http://landportal.info/landmatrix/get-the-detail/1904>

Data quality

ILC refers to a publication by Oakland Institute which provides useful starting point information.

Analysis of entry

This deal did not take place. Agrisol apparently abandoned the plans when it became clear that the projected area was home to 162,000 refugees from Burundi, which would have to be relocated. Agrisol currently leases about 14,000 hectare in Kigome. We assume that the agreement for this latter acreage was closed in 2009.

Crops

White maize and soy for domestic consumption.

Concerns

Many concerns have been expressed on the 219,000 hectare plans that did not materialise. No concerns have been found for the 14,000 ha currently leased by Agrisol. According to the company website, their activities in Kigome involve smallholder training and community development programs.

Literature

- Oakland Institute, 2011, Understanding land investment deals in Africa, Agrisol Energy and Pharos Global Agriculture Fund's land deal in Tanzania, Land deal brief – june 2011 http://media.oaklandinstitute.org/sites/oaklandinstitute.org/files/OI_AgriSol_Brief.pdf
- Agrisol Energy company website: http://www.agrisolenergy.com/our_projects.html
- Agrisol Energy Tanzania Ltd company website: <http://www.agrisoltanzania.com/>



Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #2030	Zambia	Unknown	200,000	Jatropha, sugar cane, wheat	2009	-
Ecofys assessment:			0	n/a	n/a	n/a

Source

<http://landportal.info/landmatrix/get-the-detail/2030>

Data quality

ILC information leads to one source based on a news article that quotes what the Agriculture Minister Brian Chituwo told Reuters on the sidelines of the World Economic Forum on Africa in Cape Town.

Analysis of entry

The Minister is cited that a US company and a Dubai Company were interested to invest in sugar cane (US company) and rice and wheat (Dubai company). He added, "They are looking at 200,000 hectares, but we have 900,000 hectares of prime land available so the issue of land really should not be a problem".

Additional sources were found, but they all refer either to the news article or to the Land Matrix. This is not a deal.

Crops

Not assessed.

Concerns

Not assessed.

Literature

- Reuters, 2009 06 12, US, UAE firms eye Zambian farming land, <http://www.reuters.com/article/2009/06/12/ozabs-grains-zambia-idAFJ0E55B0MB20090612>

Entry	Country	Company	Acreage (ha)	Crop	Year deal	Concern
ILC #2177	Brazil	Cargill	300,000	Soy	Unknown	-
Ecofys assessment:			104,100	Soy	2000-2010	Generic concerns

Source

<http://landportal.info/landmatrix/get-the-detail/2177>

Data quality

ILC refers to one report by Greenpeace [2006].

Analysis of entry

The Greenpeace report focuses on the destruction of the Amazon forest by soy plantations. It describes the case of Santarém, a town in the state of Pará. It explains that in the late 1990's, Cargill illegally started the construction of a harbour there and actively promoted the establishment of soy plantations in the surrounding region (Santarém and Belterra). The report refers to the 300,000 ha land not as a land deal but as the potential land suitable for soy cultivation according to a declaration of Cargill's director in 2002.

Large landowners have been accused of illegal establishment of new plantations through deforestation and of unfair land deals with small peasants. Figures on the real deals are not provided. Greenpeace reports on one deal for 8,000 ha by the brothers Cortezia. Apart from this, we have found no evidence of closed deals. Still, the expansion of the soy cultivated area in the State of Pará is an indirect indicator that deals might have taken place. The soy cultivated area in the State of Pará increased from 15,000 to 120,000 ha between 2002 and 2012 [Conab, 2013]. We have found no evidence that the remaining acreage concerns closed deals. We conclude that land deals were largely not carried out by Cargill.

The soy cultivated area in the State of Pará increased from 0.7 kha to 104.8 kha between 2000 and 2010 [Conab 2013].

Crops

Not assessed.

Concerns

Not assessed.

Literature

- Conab, 2013, INÍCIO > PRODUTOS E SERVIÇOS > SAFRAS, <http://www.conab.gov.br/>

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ECOFYS Netherlands B.V.

Kanaalweg 15G
3526 KL Utrecht

T: +31 (0) 30 662-3300

F: +31 (0) 30 662-3301

E: info@ecofys.com

I: www.ecofys.com