



# The Land Matrix Initiative **in Asia**

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Land Matrix Asia Focal Point

Asian Farmers' Association for Sustainable Rural Development (AFA)

# Outline

- Introduction to the Asia Focal Point
- Some trends in large scale land acquisitions in Asia
- A few examples of land deals (Cambodia)

# The Asia Focal Point

- Asian Farmers' Association (AFA): a regional association of 17 farmer organizations in 13 countries in Asia
- Areas of work include: data gathering, networking, research and communication
- Structure includes:
  - Regional data unit composed of data coordinator and data assistant
  - Country coordinators being established in 12 Asian countries where AFA has members and partners
  - Network of data contributors being established in 40 Asian countries assigned



# Updates

## Data gathering

- Review/update/improvement of data on existing land deals
- Entry of data on new land deals

## Networking

- Introduction of Land Matrix to AFA members (General Assembly, May 2014; Executive Committee Meeting, November 2014)
- Introduction of Land Matrix to ILC Asia members (Land Forum and General Assembly, October 2014)
- Introduction of Land Matrix to MTCP2 farmer organizations (Regional Steering Committee Meeting and Sub-Regional Steering Committee Meetings; 2014-2015)
- Introduction of Land Matrix to APAARI (Executive Committee Meeting, May 2015)

## Research

- Capacity building on data analysis being planned
- Linking with research institutions and other groups who can use the LM data for research

## Communication

- Blog – [www.landmatrixasia.wordpress.com](http://www.landmatrixasia.wordpress.com)
- Facebook Page: [www.facebook.com/landmatrixasia](http://www.facebook.com/landmatrixasia)
- Twitter Account: [www.twitter.com/landmatrixasia](http://www.twitter.com/landmatrixasia) (@landmatrixasia)
- Brochure
- Poster

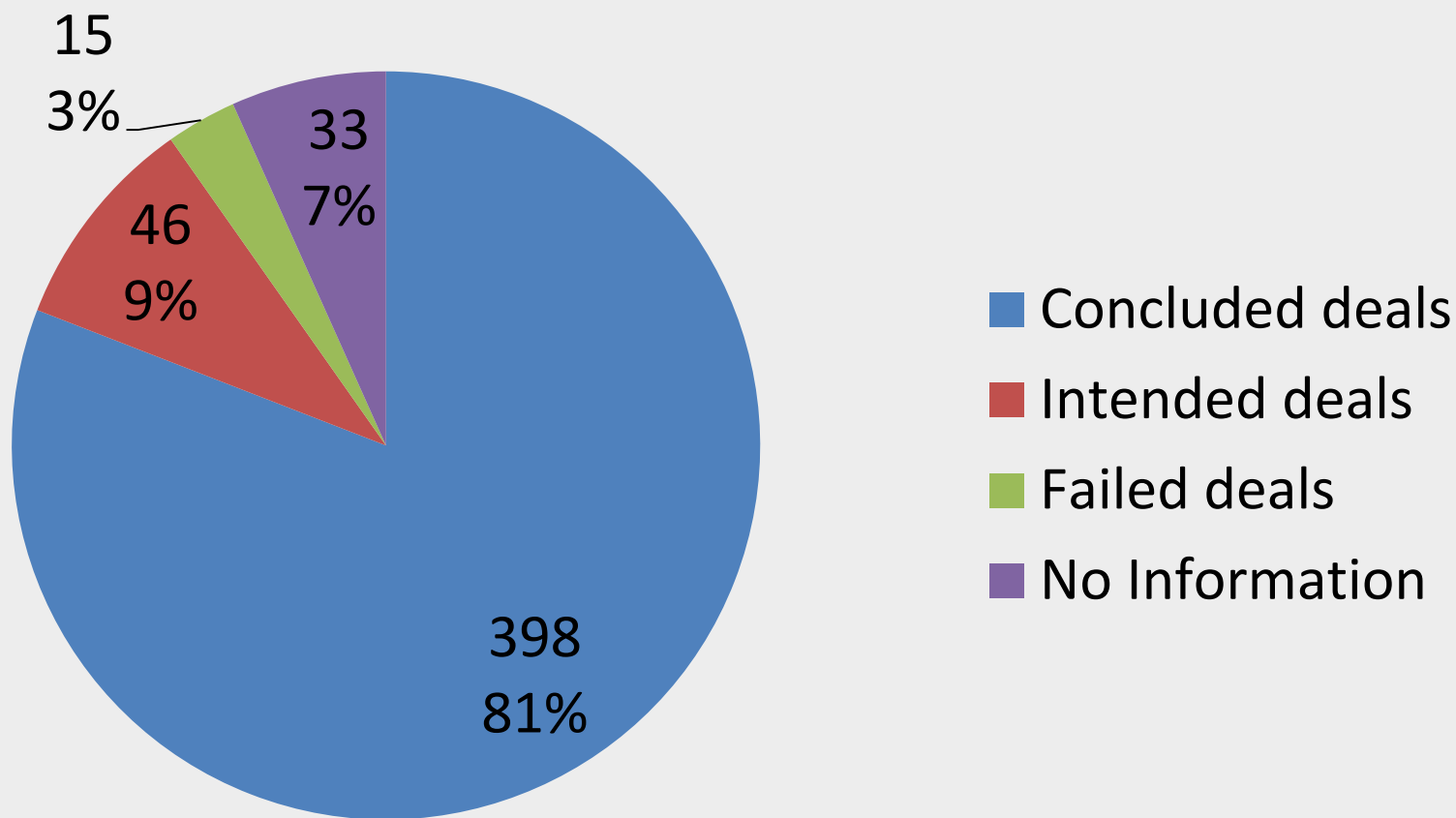
# How much land is being acquired? (Negotiation Status)

	Number of cases	Intended size (has)	Size under contract (has)
Concluded deals	398	13,493,896	10,464,269.00
Intended deals	46	5,479,179.00	N/A
Failed deals	15	2,385,172.00	1,138,745.00
No Information	33	719,339	214,958
<b>Total</b>	<b>492</b>	<b>22,077,586.00</b>	<b>11,817,972.00</b>

**398 deals concluded  
with 10.5 million hectares under contract**

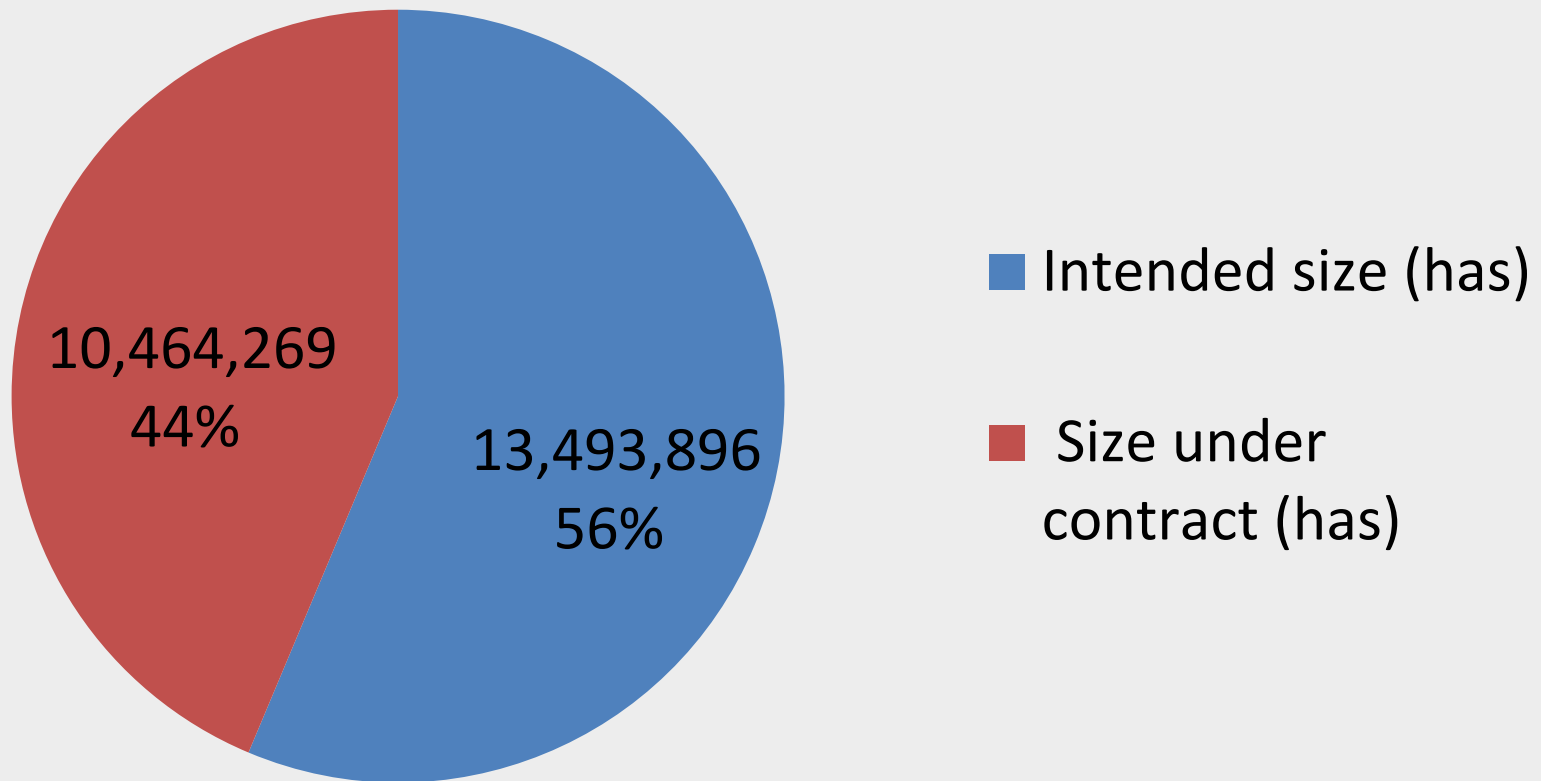
Data as of  
2/14/15

# 81% of deals have been concluded



**Indicating high success rate in negotiation**

# Intended size exceeds size under contract



**Indicating possible expansion of contracted area in the future**



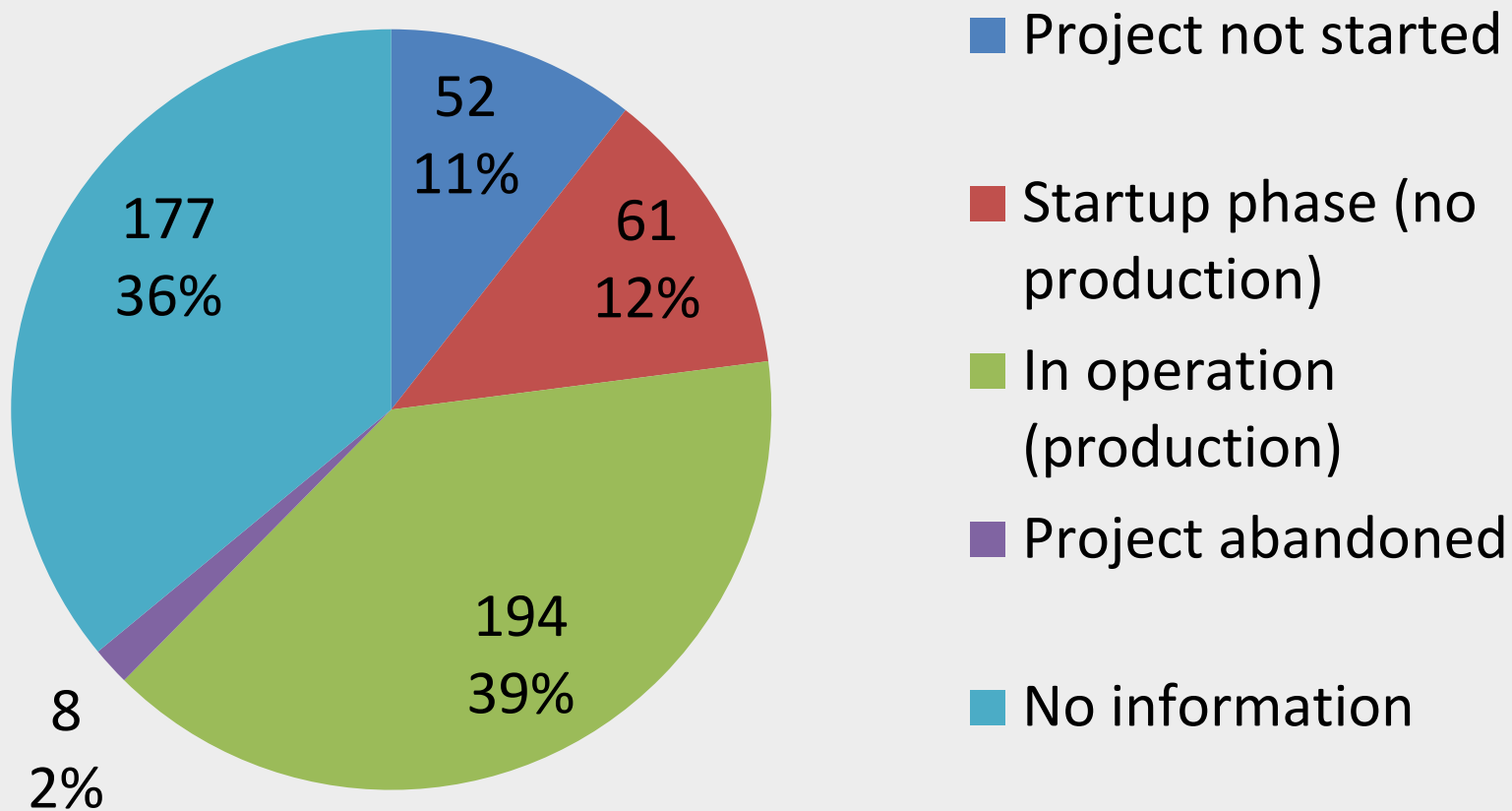
## How much of the land acquired is already being utilized? (Implementation Status)

	Number of concluded deals	Size under contract (has)	Current size under production (has)
Project not started	52	899,379	NA
Startup phase (no production)	61	614,702	NA
In operation (production)	194	4,845,434	1,352,439
Project abandoned	8	1,131,592	NA
No information	177	4,393,072	NA
<b>Total</b>	<b>492</b>	<b>11,884,179</b>	<b>1,352,439</b>

**194 deals in operation  
with 1.4 million hectares under production**

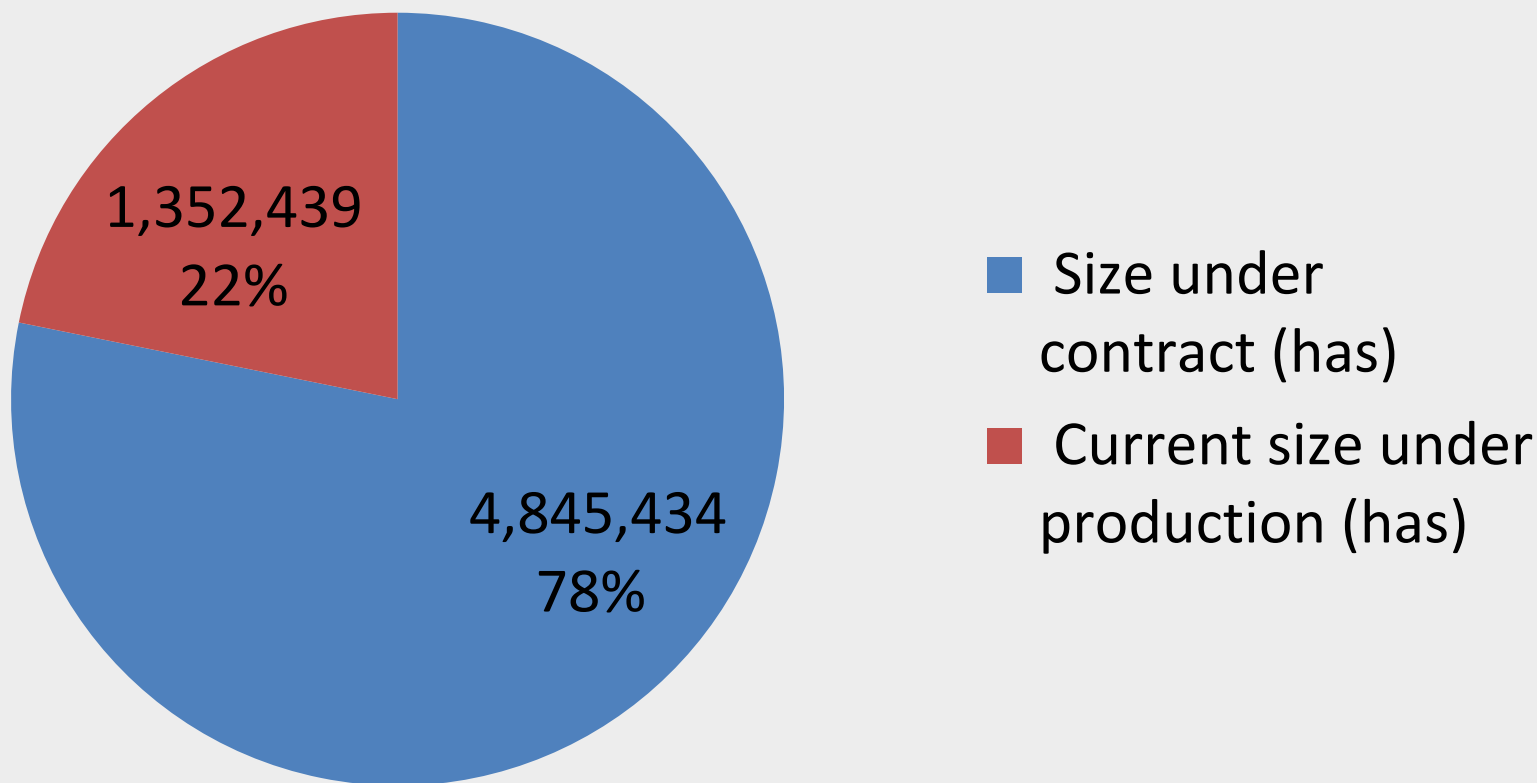
Data as of  
2/14/15

# Only 39% of deals are in operation



**Can increase once more information is gathered**

# Only 22% of areas in operation are under actual production



**Indicating slow phase of implementation**

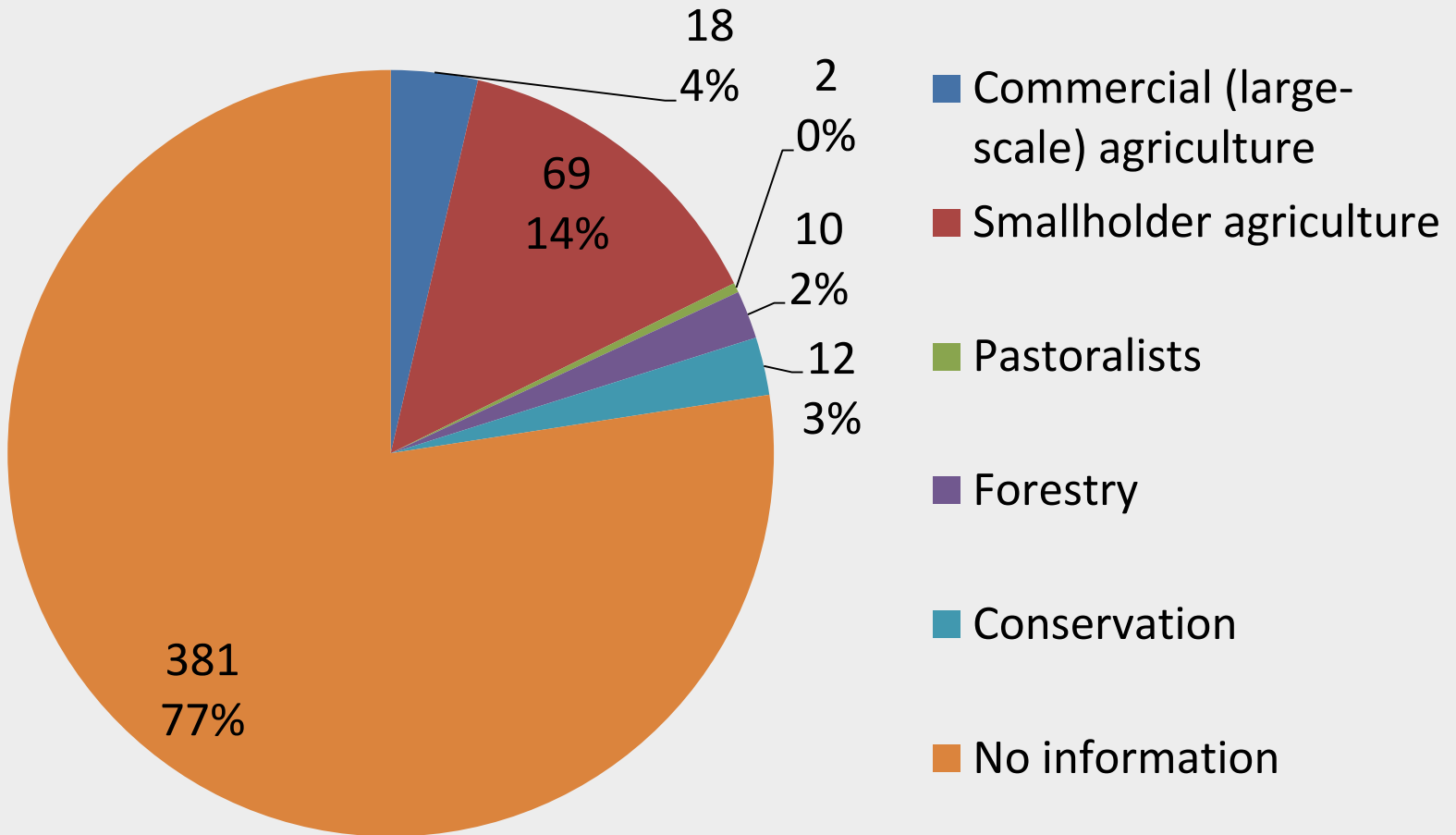
# What kinds of land are being acquired? (Former Use of Land)

	Number	Percent
Commercial (large-scale) agriculture	18	3.66
Smallholder agriculture	69	14.02
Pastoralists	2	0.41
Forestry	10	2.03
Conservation	12	2.44
No information	381	77.44
<b>Total</b>	<b>492</b>	<b>100</b>

**5 categories of former uses of land**

Data as of  
2/14/15

# Agricultural lands are being targeted



**Can change once more information is gathered**

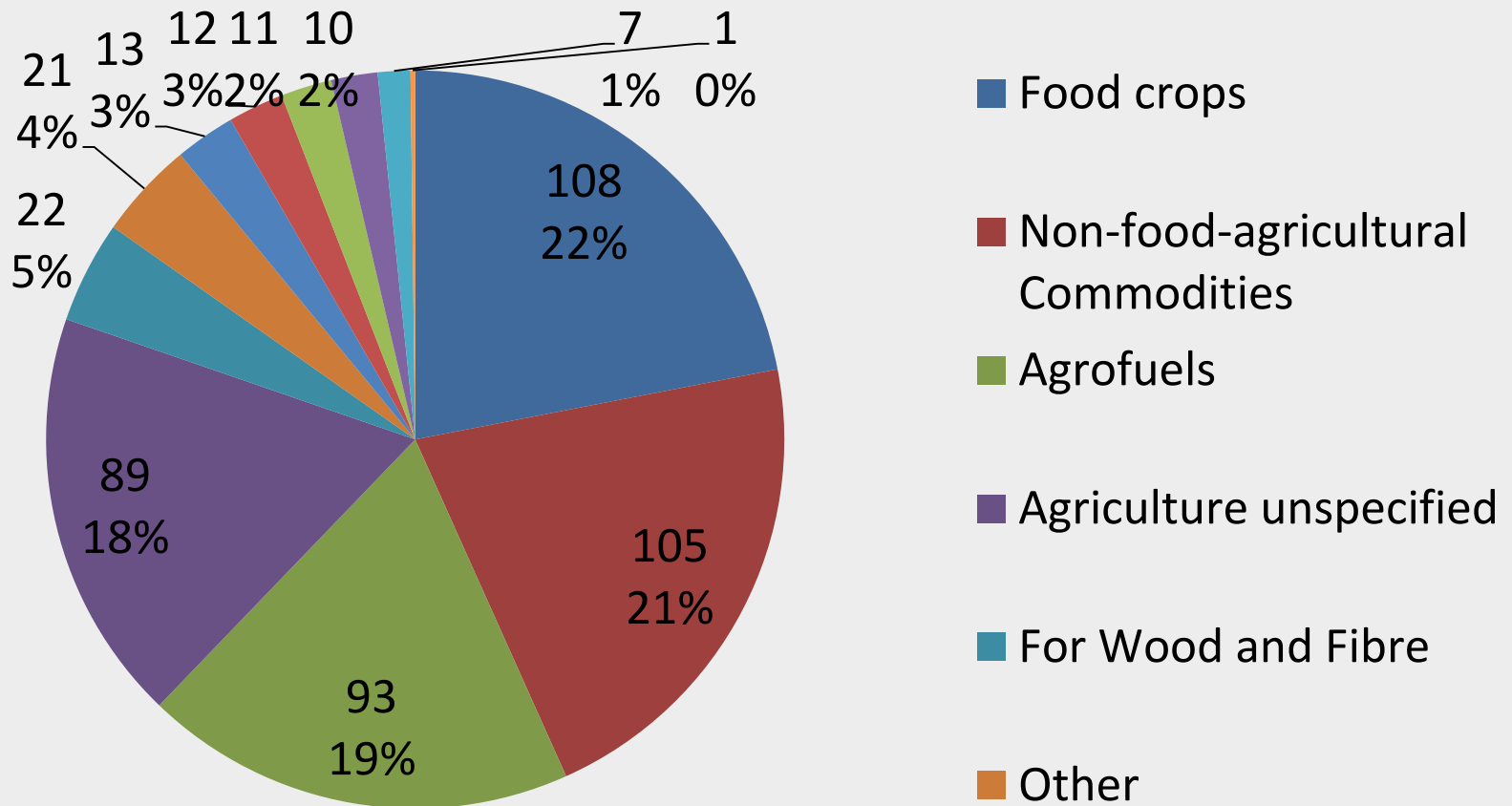
# What is the land being used for? (Intention of investment)

Intention of investment	Number	Percent
Food crops	108	21.95
Non-food-agricultural Commodities	105	21.34
Agrofuels	93	18.9
Agriculture unspecified	89	18.09
For Wood and Fibre	22	4.47
Other	21	4.28
No information	13	2.64
Industry	12	2.44
Livestock	11	2.24
Forestry unspecified	10	2.03
Tourism	7	1.42
Renewable Energy	1	0.2
<b>Total</b>	<b>492</b>	<b>100</b>

**12 categories of intention of investment**

Data as of  
2/14/15

# Food, non-food agri commodities, unspecified agriculture, agro-fuels are main drivers



**Deals are almost evenly distributed among the 4**

# How do the deals look like? (Some examples from Cambodia)

- Some companies use sub-companies to lease lands more than the allowed 10,000 hectares (e.g. Mitr Phol Group)
- Most lands were leased by the government (economic land concessions)
- Communities forcibly evacuated in many cases







## Mitr Phol Group (secondary investor)

	Deal #17	Deal #73	Deal #95
Location:	Oddar Meanchey, Cambodia	Oddar Meanchey, Cambodia	Oddar Meanchey, Cambodia
Current size under contract	<b>6523 ha</b>	<b>6595 ha</b>	<b>6618 ha</b>
Intention of the investment:	Agriculture, Biofuels, Food crops	Agriculture, Biofuels, Food crops	Agriculture, Biofuels, Food crops
Produce Info:	Sugar Cane	Sugar Cane	Sugar Cane
Investor (primary):	<b>Angkor Sugar Co. Ltd.</b>	<b>Cane and Sugar Valley</b>	<b>Tonle Sugar Cane Co. Ltd.</b>



## A call to action

- Help us improve the data in the region
  - Validate or update existing deals
  - Report a new deal not yet in the database
- Use the data
  - For research and analysis
  - For policy dialogues
  - For advocacy and campaigns
- Tell us how it can be made more relevant and useful to you
  - Data needed
  - In what form
  - How you can get involved



Thank you!



# The Land Matrix Initiative in Central Asia

Bolormaa Tsooj  
Environmental Development JASIL Association

## Engagement and role

- Oct.2014 became part of LM team
- Provide land deal data's for the LM database
- Data collection, facilitate regional network
- Establish networking with CA organizations
- Broaden the LM in CA (Mongolia, Kazakhstan and Kyrgyzstan)
- Main drivers on LSLA in CA is mining and agriculture deals
- Data analysis on certain deal to show the land deal trend

## Progress on the LM database

- **Mongolia**- uploaded 3 new and pending 2 new land deal transactions, updated the existing deal
- **Kyrgyzstan**- reviewing and preparing the the 79 new land deal data to add on LM database
- **Kazakhstan**- reviewing and validating the existing land transactions

