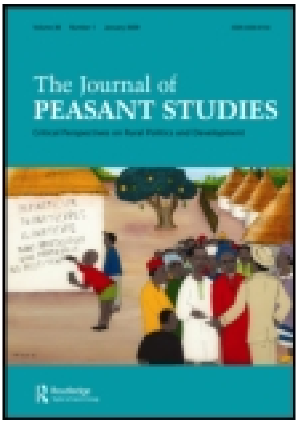

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Irna Hofman & Peter Ho

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China's 'Developmental Outsourcing': A critical examination of Chinese global 'land grabs' discourse

Irna Hofman and Peter Ho

This paper examines China's overseas land-based investments in agriculture. Our hypothesis is that – despite extensive media, NGO and scholarly attention to China's global resource-seeking activities – the discourse on Chinese 'land grabs' is insufficiently informed by the available data. Moreover, we argue that China's overseas land-based investments are part of what can be termed 'developmental outsourcing'. Different from a conventional interpretation of outsourcing, this concept refers to global off-shoring in which the state plays a key role in planning, intervention and regulation. This paper does not aim to provide definitive answers, yet intends to scrutinize the data and re-examine the 'land grabbing' discourse. This will be done by studying land-based investments in terms of incidence, size and geographical dispersion over 1949-2011. Where relevant and possible, other variables such as the investor, data source, investment type and outcome will be discussed. Lastly, we will also discuss the data quality and reliability.

Keywords: China's expansion; going global; property; FDI; soft power; economic diplomacy; globalization

Introduction

When scrutinising China's 'land grabs' one encounters two interrelated debates. The first debate revolves around concerns about feeding the increasing world population and the future outlook of agriculture. The second debate relates to discussions on globalization and corporate social responsibility.

In the first debate, the alleged merits or threats of 'land grabs' have resulted in various studies over the past years (see for example Deininger 2011, Bush *et al*. 2011, De Schutter 2011, Borras and Franco forthcoming 2012). In short, it boils down to the question of whether land acquisitions are entirely negative for poor and socially vulnerable groups, or whether they might also entail positive effects – or might even

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be a sheer necessity to feed the world[1]. China's role in the global 'land grab' is part and parcel of this debate. An alarmist report by Grain (2008), a Spanish-based NGO, identified China as a major 'land grabber'[2]. Is China a 'neocolonial power in the making' (Adem 2010, 335) or does China also aim to espouse economic prosperity in recipient countries?

The 'China expansion' discourse features parallels with the second discourse on globalization and corporate social responsibility which, too, is split between arguments of 'zero-sum' and 'win-win' opportunities.[3] Rather than taking sides – be they neo-liberal or critically anti-globalist – would we like to point to the need to probe and capture the complexity of social phenomena. As much as globalization features multi-layered and paradoxical processes that might be simultaneously ongoing at a given time and locus, we posit that China's overseas land-based investments might demonstrate a similarly multi-layered and paradoxical nature.

However, the array of China's global agricultural activities have not been studied in an inclusive way: neither in a solid qualitative nor in a quantitative sense.[4] It is precisely China's increase in foreign agricultural land investments on which we will focus. To capture the complexity of China's land acquisitions, three things are required:

1) to make a comprehensive inventory of the debate on China's 'land grabs', in connection with available data;
2) to conduct fieldwork research on the ground; and
3) to assess the resulting research results case by case, country by country.

It falls beyond the scope of a single article to embark on the second and third points (on-site fieldwork and a case-by-case analysis), however these need to remain on future research agendas, including ours.[5] Hence, here we will focus on the analysis of the discourse and the available material. Before doing so, it is critical to make two remarks.

[1]Currently the FAO together with IFAD, UNCTAD and the World Bank are finalizing a set of voluntary guidelines on Responsible Agriculture Investments (RAI) for private sector investors, civil society and governments. The initiative is subject to critique, which is based on the underlying presumption that large scale land investments are a necessity (see e.g. Borras and Franco 2010a); furthermore it is questioned to what extent investors will be receptive to these voluntary guidelines in absence of any sanctioning mechanism.

[2]As Grain (2008, 3) stated, 'From Kazakhstan to Queensland, and from Mozambique to the Philippines, a steady and familiar process is under way, with Chinese companies leasing or buying up land, setting up large farms, flying in farmers, scientists and extension workers, and getting down to the work of crop production'.

[3]In this respect, Fiss and Hirsch's (2005) study might be relevant, as it painstakingly describes how the globalization discourse over time has evolved from a predominantly neutrally worded discourse towards a dichotomous (pro-con) debate. At the same time, Fiss and Hirsch point to the need to ground discourse analysis in the cultural and time-specific contexts in which they emerge.

[4]To date research on China's foreign agricultural activities is primarily geared to Chinese projects in Africa in the last decades. For an overview see Bräutigam (1998), Bräutigam and Tang (2009), and Yan and Sautman (2010). Other studies zoomed in on resource extractive industries and other sectors (cf. Wang 2007, Alden 2007/2005, Gu 2011/2009, Humphrey and Schmitz 2007, Kaplinsky and Morris 2009).

[5]The results of this article will be part of a larger research program with research in Peru, Tajikistan and Malaysia.

First, when it comes to foreign land acquisitions, Chinese investors are one type of actor among a wide range of foreign private and public investors, including those from Russia, the Gulf States, South Korea and India (Grain 2008, Cotula *et al*. 2009, von Braun and Meinzen-Dick 2009, Borras *et al*. 2011, Visser and Spoor 2011). Equally important in the recent wave of land acquisitions are domestic elites and intraregional corporations. For instance, while being the recipient of foreign investments, a number of Latin American countries also invests in agricultural land themselves (Borras *et al*. 2011).

Thus, with regard to what is coined a worldwide 'land grab', one therefore should also examine the distinctiveness of Chinese investors vis-á-vis the others. However, what is clear from the discourse is that a 'global magnifying glass' is put on China's every move in the world, which – regardless the specific effects of these moves – will be influenced by the perceptions and associated fears -'the yellow peril' – or expectations of China as an emerging global power or as the 'booming billion consumers' market'.

Our second remark is that, although the discourse pretends the opposite, it is difficult to make conclusive statements about the actual impact of Chinese land investments. This is due to the fragmentation, inconsistency and, at times, complete absence of solid, scientific data from the ground. As a result, a reliable and sound quantification and qualification of Chinese land-based investments is beyond our reach. For instance, Bräutigam and Tang (2009) postulated that Western media and NGOs publish statistics of Chinese land-based investments without prior verification, while the real numbers and the implementation of the projects are uncertain or even doubtful (see also Yan and Sautman 2010). We will go into detail on this issue in later parts of this article.

Unpacking the discourse: Research questions and concepts

Against the backdrop above, we probe the development and magnitude of Chinese land-based investments over time and place. For this purpose, we made an inventory of the available data drawing on a large variety of sources, varying from scientific databases and portals to NGO reports and newspaper articles.[6] In the discussions around Chinese global investments, the terms 'land grabbing' or 'land grabs' frequently surface. We prefer to use more neutrally worded terms of 'overseas land-based investments' or 'land acquisitions'. In fact, a clear definition of a 'land grab' is non-existent, as researchers and organisations apply different standards[7] We define it as the acquisition of user rights[8] abroad for an area of over 1,000 hectares in order to outsource domestic agricultural production.

It will be argued that China's overseas land-based investments are part of what we term '*developmental outsourcing*'. For one, based on the reviewed material it is

[6]For an overview of the sources, see the article's section on Chinese land acquisitions in time and place.

[7]For instance the oft-cited report *Seized* by Grain (2008) lacks a clear definition of 'land grabbing'. Cotula *et al*. (2009) distinguish foreign land investments with a minimum size of 1,000 ha. The FAO uses a definition of 'land grabs' that is 'anchored on three interlinked dimensions: a) large-scale land acquisition; b) involvement of foreign governments; and c) negative impact on food security of the host country' (Borras *et al*. 2011, 10).

[8]Different from theft of ownership, as the term 'grab' suggests, access to land for agricultural outsourcing is generally secured through lease with terms typically varying from 30 to 99 years.

clear that outsourcing or off-shoring of agricultural production is taking place. Outsourcing is associated with the contracting out of a business function to an external party due to comparative advantages in labour costs or economies of scale (Yourdon 2004). Yet, in the Chinese case the greater supply of natural resources abroad – here, agricultural land – is the driving force.

Furthermore, different from a classical economic view in which free markets and 'invisible hands' determine flows of commercial production, we see that the state is a central actor. Domestically, the Chinese state has been typified as a classic example of an East Asian 'developmental state',[9] i.e. featuring highly autonomous and strong macroeconomic planning, intervention, and regulation. Strikingly, what might be learnt from Chinese land-based investments is that the state plays a similarly critical role at the global level as it does domestically.

In sum, our article focuses on *China's* overseas land-based investments with particular reference to agricultural investments (e.g. food and biofuel production, and industrial tree plantations). We thus exclude: i) land-based investments by other foreign investors; ii) Chinese investments in the extractive industries such as mining and logging; and iii) Chinese investments in infrastructural and energy projects (e.g. dam-building). This is not to say that there might not be a direct relation between these investments. For instance, it was reported that the Chinese state-owned company Shenhua Watermark Coal purchased the user rights to 43 farms in Australia to access coal reserves (ABC News 2011). However, as this investment does not relate to the outsourcing of agricultural production, it has not been included in our analysis.

We postulate that the discourse on 'land grabbing' is insufficiently related to and informed by the available data. To validate this hypothesis, the following research objectives will be pursued:

a) To scrutinise the discourse on China's overseas land-based investments;
b) To identify the motives and actors in Chinese global land-based investments;
c) To examine the patterns and dynamics of aforementioned investments;
d) To arrive at a better understanding of Chinese land-based investments with specific regard for the empirical complexity

Apart from the introduction and the conclusion, the article is divided into the following parts: we will start with a description of the constitutive elements in the discourse on China's 'land grabbing'. This will be followed by a discussion of the driving factors and actors behind China's '*developmental outsourcing*', where relevant with reference to food security. The subsequent empirical part gives an overview of Chinese land-based investments in terms of their incidence, size, and geographical dispersion over 1949-2011. Where relevant and possible, also the investor, investment type, reported size, data source and outcome of the investment will be reviewed. Lastly, the final section briefly discusses the quality and reliability of the data.

The discourse: From 'land grabs' to '*developmental outsourcing*'

According to Fiss and Hirsch (2005) the discourse on globalization developed from a pre-dominantly neutral to a strongly dichotomous (pro-con) debate. The discourse

[9]In other words, the other East Asian states and 'little Asian tigers' such as Japan, South Korea, Singapore and Taiwan (see also White 1988, So 2001).

on 'land grabs', however, was from the outset split into opposing camps in which those regarding China's land-based investments as neo-colonial exploitation are pitted against those who see investments as possibilities for local development through 'economic diplomacy' and 'soft power'. Without passing judgment on either side of the discourse, it is clear that China's overseas investments have sparked a heated debate, a substantial proportion of which is focusing on its land acquisitions in developing countries. Based on the material we have reviewed, we can see that the discourse on China's land-based investments was virtually non-existent before 2000. Only gradually since the mid-2000s did articles and reports on Chinese 'land grabbing' start to seep into the international literature. However, it was not until 2008, with the publication of Grain's report *Seized*, that the debate took off. In this sense, the discourse is a recent discourse.

At the forefront of China's 'land grabbing' discourse is its allegedly neo-colonial approach – i.e. the use of economic and political means to continue or extend influence in developing countries.[10] Zhou Xiaojing, vice-director of the Institute of Asian and African Development Studies of the Chinese State Council Development Research Center, outlined the main critique in People's Daily (2006) as follows:[11]

> The African version of the China threat theory includes the following points: first, preying on energy and resources in Africa, second, capturing African markets with cheap commodities; third, developing China's economic model and challenging concepts of so-called democracy and human rights that are adopted by the United States and other Western countries (Zhou 2006, 1).

Presumably, the country's global resource-seeking activities are driven by concerns over domestic economic development, food security, and the opening up of new markets. As a result, Chinese investors would infringe on the food security of the recipient countries. This issue plainly came to the fore in 2011, when a German official assaulted China for having caused the famine on the Horn of Africa (Szent-Ivany 2011, Yap 2011). Others have contested this, and emphasised that Chinese teams working in Africa seek to enhance food security on the continent itself (see Zhou 2006, Rubinstein 2009).[12] According to Yap (2011) custom statistics do not confirm that China is shipping large quantities of food commodities back home; in his words, 'China last year only imported 32,583 tons of a canola byproduct from Ethiopia – epicenter of the current famine – and hasn't imported any farm product from any East African nation so far this year' (Yap 2011, 2).

At a more generic level, a recurrent theme in China's international relations is the prominence of China's 'soft power' policies (Kurlantzik 2007) in international relations (cf. Wang 2010, Breslin 2009, Strauss 2009, and Power and Mohan 2010). Interestingly, China's present approach in foreign affairs has a historical parallel with the policy principles issued by Mao Zedong, which were mutual respect for territorial integrity and sovereignty; mutual non-aggression; mutual non-interference in internal affairs; equality and mutual benefit (Alden and Aves 2008, 47). The

[10]See, for instance, the classical definition in the introduction of Nkrumah (1965).

[11]Wang (2010, 7) names three popular discourses central in foreign perceptions of China's rise and the 'global implications – ''China threat'', ''China collapse'', and ''neo colonialism'''.

[12]Zhou (2006, 1) also opposes China's image as the leading contestant for resources in Africa, based on investment statistics in the oil industry, before 2006, by China and the U.S. respectively. 'But the volume of oil imported from Africa by China accounts for less than 1/3 of that of the United States'. Note that the author refers to numbers before 2006.

policies of non-interference and non-conditionality in political terms are China's current hallmarks in foreign affairs. Yet, others say that the policy of non-interference is used by China to justify the opacity around its land deals with foreign governments (Alden and Hughes 2009). Moreover, the country's unconditional aid and investments are also an opportunity for regimes to better their position without pressures to change the political system (Alden 2007/2005, d'Hooghe 2010, Strauss 2009).[13]

On the other hand, there are those who maintain that China's 'soft power' might entail a 'new economic diplomacy' that might have greater effect than Western aid programs in good governance and the rule-of-law. Alves (2006), for instance, noted that since the establishment of the Forum on China Africa Cooperation[14] (FOCAC) in 2000, 'China has reduced and exempted a total of 1.3 billion USD (10.5 billion RMB) of debts owed by 31 African countries' while 'trade between both parts has rapidly increased since then'.[15] In early 2005, China also exempted trade tariffs for a total of 190 commodities from 25 least developed African countries. These measures partly resulted in a trade deficit for China with Africa of almost 1.5 billion USD a year later (Alves 2006). China also invests in the training of human resources as, for instance, 1.500 African students are sent to China annually, while local training is done through training centres in various areas of expertise.

It is at this point that China's 'soft power' resonates with the international debates on a 'new economic diplomacy', and the impact that China's rise might have on that (Woolcock and Bayne 2007). In response to the international critique of trade with 'no strings attached', the Chinese leadership points to its own development trajectory as a potential way out for least developed nations. As argued elsewhere, China is increasingly emboldened to claim a development model of its own due to its successes in meeting the Millennium Development Goals, including in health, primary education and bringing down rural poverty (Ho 2009).[16] Implicitly, China feels justified in retorting the critique, as it once felt caught in the same developmental boat as Africa and much of the developing world – occupied and exploited by 'colonial and imperialist' powers.

As part of the FOCAC, the Chinese government initiated the establishment of agricultural training centres in several African countries. Chinese experience and know-how is highly welcomed by many governments, in particular with an eye to recent food crises (Shun 2009, Sudan Tribune 2010). In the training and extension centres teams of Chinese agronomists and other staff educate local farmers and

[13]The perception of differing Chinese versus Western interventions in developing countries has a longer history. As early as the late 1940s, Furnivall (1948, 312) noted: 'But in the tropics the European who, from humanitarian motives or through enlightened self-interest, treats his employees well, risks being forced out of business by Indians or Chinese with different standards'.

[14]The first Forums on China Africa Cooperation were held in 2000 (Beijing) and 2003 (Addis Ababa, Ethiopia).

[15]As Alves wrote: 'From 10.6 billion USD in 2000 it grew to 14.0 billion USD in 2003 and to 30 billion USD in 2004 and 40 billions USD in 2005. In the first 8 months of last year, China's exports to Africa amounted to 11.902 billion USD (growing 42.7%) and its imports from Africa to 13.332 billion USD (increase of 40.3%), meaning a trade deficit of almost 1.5 billion USD for China' (Alves 2006, 7; and also Alves 2008).

[16]Rural poverty in China was brought down from 30 to 2.8% of total population over 1979–2004. For more information about China's development model see Ho (2009, 187). Available at www.mearc.eu.

conduct research on the adaptability of Chinese seed varieties and crops to the African climate (Shun 2008, Makoni 2009, Rubinstein 2009, Buckley 2011). For some, these training centres exemplify the reason that the criticism on China's foreign investments is undeserved. For instance, writing about Mozambique,[17] Rubinstein posited that the research conducted by Chinese agronomists might improve local food security (Rubinstein 2009). The author pointed furthermore to Chinese research[18] that was funded by the Gates Foundation to develop a high-yielding rice variety that may withstand droughts, flooding, harsh weather and toxins. Marks (2008), on the other hand, wonders if China's 'altruistic' approach was something of the early days of China's foreign endeavours, and he poses that later investments often serve to supply the Chinese rather than the local food market.

A final component of the discourse touches on the effects on the local labour market of China's land-based investments. Some point to the problem that there is less demand for (local) employment, with negative outcomes for social equity, when large-scale monoculture production replaces small-scale farming (Murray Li 2011, Bush *et al*. 2011). Chinese companies also regularly dispatch their own labour force, which might entail the influx of large groups of Chinese workers.[19] Contradictorily, the need for 'labour rich' investment locations was actually one of the principles issued by the Chinese Ministry of Agriculture in 2008 (Ping 2008). With regard to labour relations in the context of Chinese land investments in Laos, Diana (2008) pointed to the multifaceted nature of exchange between Chinese entrepreneurs and local Laotian farmers.[20] It was noted that Laotian farmers have agency and room for manoeuvre to steer arrangements. If employed and implemented in a proper way, contract farming can be a means to provide farmers a secure income and access to new knowledge and expertise, while retaining ownership of the land (see also McCartan 2008).

Largely leaving the here-described 'land grabs' discourse aside, we would rather draw attention to the inherent complexity and contradictory nature of global land-based investments, and Chinese land-based investments in particular. As will be demonstrated in the article, Chinese land-based investments are a form of '*developmental outsourcing*' – in which the state, *not* the corporate sector, plays a vital role in planning and driving the off-shoring of production. Furthermore, in this sense there might be parallels with other processes of globalization – as 'developmental outsourcing' is similarly multi-layered and complex with varying, i.e. negative *and* positive, effects at the grassroots. To fathom this socio-economic complexity, we need to examine the available data, the actors, and the drivers behind the process.

[17]In Mozambique, the Chinese government announced in 2008 that it would invest USD800 million to modernize Mozambique's agricultural sector, with a focus on increasing rice production (Grain 2008, Horta 2008).

[18]More specifically, a research project led by the Chinese Academy of Agricultural Sciences.

[19]Chinese companies abroad also establish agricultural parks to facilitate interaction and cooperation between companies to produce and process agricultural commodities. Cheung and Suny (2009) define this as 'herding behaviour'. According to the authors, particularly Chinese companies working in developed countries are prone to stick together.

[20]McCartan (2008) also highlighted the diversity in which Chinese companies employ Laotian farmers: a) local Laotian farmers who individually trade through relatives across the Chinese border; b) village-based farmers' associations who share costs of inputs and labour, and divide benefits in their trade with Chinese companies; and c) Chinese agribusiness companies which contract local farmers. McCartan however states that large land concessions are obtained through the Laotian government or army, in which local communities have no bargaining power (McCartan 2008).

Going global: Food as driver for outsourcing?

Alden (2005) distinguishes different drivers of Chinese companies to invest abroad: a) resource security, b) new markets and investment opportunities; c) symbolic diplomacy; and d) forging strategic partnerships. According to Jiang (2009) Chinese companies' quest for natural resources abroad results from the perception of resource insecurity. He maintains that China's development abroad follows the same pathway of its domestic development over the last three decades (Jiang 2009).

China's sustained economic growth has put a rising pressure on the country's domestic natural resources. The oft cited numbers portraying the country's dire situation are that China boasts 21% of the world's population, while the country possesses only 8.5% of the world's available arable land, and 6.5% of the world's water reserves (UNOHCHR 2010). To complicate matters, China has lost 8.2 million hectares of arable land between 1997 and 2010, due to urbanization and environmental degradation (UNOHCHR 2010). The country became a net food importer by 2004[21] (Humphrey and Schmitz 2007).

To fuel its economic development, China projects its domestic shortages to other countries and regions abroad. The stimulus for this has become even more pressing since the country's growing middle class pursues more luxurious life styles and consumption patterns[22]. Popular food products, such as coffee, cacao, wine, and animal products, are more efficiently produced overseas, and necessitate investments abroad. As a result, the country has become a major player in the global land market over the past years.

The significant rise in China's global activities in agriculture with particular reference to its land acquisitions cannot be seen as separate from the country's global expansion in other sectors. For example, Chinese companies are also involved in infrastructure projects, mining and oil extraction around the world, while smaller scale private Chinese enterprises increasingly engage in overseas investment and production activities, too (Wang 2007, Gu 2011, Alden 2007, Frost 2004, Frost and Ho 2005). These investment activities may intertwine and coalesce in terms of interests, timing and government objectives.

From the graph below, we can see that China had invested a total of 215.9 billion USD abroad from 2006-2010.[23] The bulk of these investments went into energy and power (47.3% or 102.2 billion USD), metals and mining (28.2% or 60.8 billion

[21]The status of 'net importer' does not imply that export of food commodities does not take place. The policy changes initiated since 2000 have incited Chinese farmers to change their cropping patterns to more profit making produce. Lohmar *et al.* (2009) describe that both imports and exports have risen sharply since that time, further enforced by China's WTO accession in 2001. China is now a major exporter of cash crops such as fruits and vegetables (FAOSTAT 2008a, Lohmar *et al.* 2009). Of all food commodities, soybean tops the list of agricultural produce imported to China in 2008 (FAOSTAT 2008b, Lohmar *et al.* 2009), and is also one of the major crops steering foreign land investments (see also Ping 2008, Popper and Heath 2010).

[22]Exemplary is the current rush for so-called 'rare earths', an umbrella term for metals which are essential parts and equipment of particular (mostly) electronic products, such as mobile phones and batteries.

[23]This includes Chinese non-bond investments and investments over 100 million USD. These figures are close to the official figures of the Chinese Ministry of Foreign Trade and Commerce (MoFCom), i.e. 218 billion USD (Scissors 2010, 3).

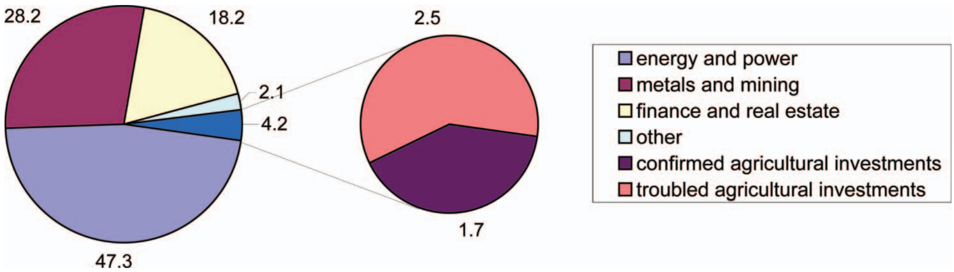

Figure 1. China's worldwide investments 2006–2010 (in percentages).
Source: Drawn by authors based on Scissors (2010).

USD), and finance and real estate (18.2% or 39.2 billion USD). Agriculture only accounted for a small proportion of total investments, i.e. 4.2% (or nine billion USD).[24] Moreover, of this figure, 60% (5.4 billion) were in fact unknown or 'troubled' investments: cancelled, or announced by the media but never or only partially implemented. The issue of unknown or troubled investments is a problem that we have also encountered in our data analysis. As will be demonstrated below, a substantive part of Chinese investments that are agreed upon or announced in the media never materializes.

The pace of Chinese investments in the last decade follows the state's 'going global' strategy (Freeman *et al*. 2008, Alden 2007/2005, Gu 2011, Cheung and Suny 2009). The first formal policy to enhance the global expansion of different sectors of the Chinese economy was launched in December 2000 in the tenth Five Years Plan: '...encourage outward investment that can bring into play China's comparative advantage, widen the areas...' (cited in Freeman 2008, 4). In a broad sense, the government initiated the strategy to enhance global expansion of Chinese companies. For agricultural production this particularly pertained to natural rubber, oil-bearing crops, cotton, vegetables and timber (Freeman 2008, 5).

In 2008 the Ministry of Agriculture further spurred the global expansion of Chinese agribusinesses (Ping 2008). Its new policies identified investment potential for state-owned enterprises, with a special focus on edible oil-bearing crops, in Central Asia, Russia, Africa, Southeast Asia and South America. Moreover, the Ministry also issued principles on which foreign farm investments should be based: farming locations should be situated in countries on *good terms* with China, which are rich in *resources* and *human capital*, while being *politically stable* (Ping 2008).

Earlier attempts to expand global activities by Chinese companies failed due to absence of state support. Chinese agricultural experts, entrepreneurs and officials therefore urged the government to keep oversight in overseas land investments to manage risks involved in investments, related to trade, diplomacy, security and manufacturing. The Ministry of Agriculture recommended its companies to establish cooperative agreements in order to avoid criticism of a 'neo-colonialist' approach (Ping 2008).

[24]This figure also includes 0.2 billion USD or 2.2% of total investments for agricultural construction contracts (Scissors 2010, 3).

In the debates on China's overseas land-based investments, there is a tendency to simplify matters. For one, 'China' is seen as a monolithic agency – a single actor on a worldwide quest of natural and mineral resources. However, the term 'China' in fact denotes a wide variety of state, semi-state and private actors.

Disaggregating Chinese actors in overseas land acquisitions

What characterizes Chinese overseas investments in general, and land-based investments in particular is the mix of private and public interests; the ambiguity in terms of 'public' or 'state', versus 'private' (Wang 2007, Kaplinksy and Morris 2009). This 'institutional ambiguity' (Ho, 2005) has everything to do with China's economic transition during which the state gradually privatized state and collectively-owned assets, resulting in a confusing hybrid mix of semi-public, semi-private entities. As a result, the precise association and influence of the Chinese state is difficult to identify.[25] Chinese State-Owned Enterprises (SOEs) operating overseas are closely followed and criticized by foreign observers because of the supposed governmental backing (Gu 2011). However, as Tang and Li (2010) describe, also *private* enterprises operating overseas receive governmental support to enhance their global expansion (Tang and Li 2010).

For the purpose of this article, we distinguish five different categories[26] of Chinese actors that engage in overseas land investments:

1. *National companies* with direct linkages to the central government. Their investments have a global outreach; these SOEs operate under formal state-state agreements and are expected to further the state's strategic objectives (Kaplinsky and Morris 2009). The primary state agribusiness company is the China State Farm Agribusiness Corp (CSFAC), which closely collaborates with the Chinese Ministry of Agriculture. Regional branches of the CSFAC, frequently operate in conjunction with the CSFAC (Freeman *et al*. 2008). Note that non-agricultural SOEs also engage in land investments, such as the China National Offshore Oil Corporation (CNOOC), which invests in land for biofuel production. Although the SOEs have strong linkages with ministries, they have become more independent corporations with international subsidiaries (Jiang 2009). The former SOE ZTE, one of China's largest telecom companies, has become active in overseas land investments recently too.
2. *Provincial state-owned companies* backed by provincial, and sometimes also national authorities. Initially they operated primarily in neighbouring countries; today they also invest in projects further away. The regional companies are expected to operate in accordance with provincial policies of decentralization and experience pressure to make profits (Kaplinsky and Morris 2009). As a result,

[25]The lacuna in precise information about Chinese companies' structure, size and governmental backing limits further distinction of the actors involved in Chinese foreign land investments: 'There are few issues as contested and as difficult to grasp as the exact nature of the privatisation of the Chinese economy' (Gu 2011, 30).

[26]Our categorization is an elaboration on the actors distinguished by Freeman *et al*. (2008). We have added two categories – Chinese individuals and Chinese financial institutions – that started to play an increasingly important role in the last five years. In addition, we make a distinction between *national* and *provincial* state companies because particularly the provincial ones have become prominent actors globally.

their activities have become increasingly commercially oriented (Freeman *et al.* 2008). A prominent example of this category of SOEs, is the 'Beidahuang (BDH) Group', one of China's largest agricultural enterprises with various branches and subsidiaries. The company is a former (military) state farm, previously set up to reclaim the wastelands and forests of what once was Manchuria (today administratively divided into Liaoning, Jilin and Heilongjiang provinces). As a former state farm, Beidahuang Group – in Chinese the 'Vast Northern Wasteland Group' – is closely linked to the provincial government of Heilongjiang and the People's Liberation Army.[27]

3. *Private small and medium-sized enterprises* (SMEs), which in fact largely escape Chinese governmental control. According to Freeman *et al.* (2008) these companies mainly target adjacent countries, such as Myanmar, the Lao People's Democratic Republic (PDR), Cambodia and Russia. Yet Chinese private enterprises operate all over the globe. It is a reasonable consequence of the global expansion of SOEs that private enterprises have followed suit in overseas investments (Cheung and Suny 2009, Kaplinsky and Morris 2009). As stated by Wang (2007), Chinese private companies are in fact the engine of Africa's economic growth (see also Gu 2009, Kaplinsky and Morris 2009). In pursuit of profit, they determine their own development path abroad (Gu 2009, Kaplinsky and Morris 2009, Cheung and Suny 2009). Complicating the picture is the fact that the Chinese economic transition has yielded an overwhelming variety of corporate ownership. Thus, what is denoted as 'private' could be a full-fledged private, but also a former state or collectively-owned company. For instance, among the SMEs, one can find many of the past 'township and village enterprises' (Ho *et al.* 2004). These started out as companies owned and controlled by the rural collective, yet, over time became more market-oriented and privatized.
4. Enabling and extending credits for Chinese investments, is a fourth group of actors, i.e. the *financial institutions*, most notably the China Development Bank (CDB), responsible for the China-Africa Development Fund and the ExIm Bank (Export Import Bank) (Freeman *et al.* 2008). In addition, there are various Sovereign Wealth Funds, of which the most important is the China Investment Corporation (CIC). Together with the CDB and ExIm Bank, the CIC manages Chinese substantive foreign exchange reserves, and provides venture capital for projects overseas. Detailed information about CIC's investment portfolio is scarce.
5. *Chinese individual expats* dispatched in teams by the state to work in agricultural training centres. Most teams are employed for a period of two years, and replaced thereafter (Buckley 2011). China's development aid projects established between the 1960s and 1990s in different African countries functioned in comparable ways. Some expats dispatched in development aid projects during that time, later benefited from their 'Africa experience' and prolonged their stay independently from the government, sometimes even to become owner of a former research farm (Bräutigam 1998, Buckley 2011).

[27]In the past, the Chinese state established (military) state farms to reclaim and 'pacify' the border regions. Other examples of these are in cotton production in Xinjiang and timber exploitation in Heilongjiang (see Ho 2009, 7; and Ho 2006, 591).

China's land acquisitions in time and place: Scrutinizing the evidence

As we set out in the introduction, apart from describing the discourse, this article also aims to assess the available data on Chinese overseas land acquisitions. This has been done by reviewing and analyzing a wide pool of sources.[28]

The analyzed data have been depicted in a series of world maps along four dimensions: i) the incidence of Chinese overseas investments, i.e. the number of *new* cases; ii) their development over time; iii) size range of investment; and iv) their geographical dispersion. A few words of additional explanation are needed at this point. On the basis of the available data, it is extremely difficult to assess how many new projects have been committed at a given time and place as the information on Chinese investments is notoriously unreliable.

As Scissors (2010, 3) writes: 'Host countries boast of and the media breathlessly report investments that might never occur (such as in Nigeria) or huge but largely unused loan facilities (such as in Venezuela). Legitimate transactions are re-announced again and again.' Moreover, a substantive proportion of Chinese land-based projects is rejected at a late stage by regulators, or run into problems during the execution phase leading to partial or complete cancellation. Perception of the 'Chinese taking over' leads to protest from civil society and political opposition parties, and is often a cause to reconsider or even cancel previously announced investments. For instance, on a total of over 130 investment cases we found that close to one-third is contested to a certain degree (see Table in Appendix).

To stay on the safe side, we have depicted investments in the map with limits set at between 1-10, and over 10 investments. These are relatively conservative limits on which basis it can be safely stated that the number of investments is at least below or above the threshold of 10. However, how far above 10 investments can not be said without making unfounded guesses. Due to the limitation of space and the inconsistency of data (some sources report size, others do not), we could only include a rough classification of investment size, i.e. between 1,000-100,000 ha. 100,000-1,000,000 ha. and over 1,000,000 ha. Thus, investments below 1,000 ha. are excluded, following our definition of an overseas land acquisitions in the introduction of this article. However, for reasons of comprehensiveness, we listed

[28]These sources are: ABC News 2011, Abella 2010, Arte Reportage 2009, Barrionuevo 2011, Biopact 2007, Borras *et al*. 2011, Bräutigam 1998, Bräutigam and Tang 2009, von Braun and Meinzen-Dick 2009, Buckley 2011, Bui 2008, Bunting 2010, Callick 2008, Chifamba 2011, China Daily 2008/2003, China.org.cn 2003, Christie 2010, Colchester 2011, Cotula *et al*. 2009, Crittenden 2010, Daley 2010, Demytrie 2010, Diana 2008, Dixon 2011, Dow Jones 2011, Dwyer 2011, Eleiseguii 2010, Farr 2010, Freeman *et al*. 2008, Fresh Fruit Portal 2011, Fullbrook 2010, Furuya 2010, van Gelder 2005, Le Gouvernement de la République du Mali 2009, Grain 2011/2010/2008, Gray 2009, Hasenfuss 2011, Hinckley 2011, Horta, 2009/2008, IRIN 2009a/b, Jamaica Gleaner 2010, Jimenez 2009, Kazakhstan Today 2009, Konstantinova 2011, Lewis 2009, Lucas and Daneshkhu 2011, Makoni 2009, Marks 2008, McCartan 2008, Meldrum 2003, Myers 2010, Naulin 2009, Nonfodji 2011, NoosaNews 2011, NZ Herald 2010, Ooi 2010, Padilla 2007, Pannier 2011, Patton 2009, Paxton 2011, Ping 2008, RFERL 2011, Rubinstein 2009, Rutherford *et al*. 2008, Sainsbury 2011, Scherer 2011, Sedgman 2011, Shi 2008, Shun 2008, Smith 2011, Smith 2010, Smith and Talbot 2009, Spencer 2008, Stack 2011, Sudan Tribune 2010, The Economist 2011, The Guardian 2008, Times of Zambia 2010, TVNZ 2010, UNCTAD 2009, UNOHCHR 2007/2004, Urquhart 2009, Visser and Spoor 2011, Xinhua 2010/2004, Yan and Sautman 2010, Yang 2008.

all investments – also those below 1,000 ha. – in the overview Table in the appendix.

Based on evident shifts in the incidence of Chinese overseas investments over time, we have distinguished three respective periods: 1949-1999; 2000-2008; and 2009-2011.[29] Only if the data analysis demonstrated a significant increase or decrease in the number, size and/or geographical distribution of new investments, a specific year was selected for periodization. The last period runs until the end of 2011 and includes, apart from actual investments, also potential (or announced) investments for 2012 and beyond. The potential investments have been depicted separately in the maps (⋆).

To maintain overall readability of the maps, several other variables have not been included: i) name of the investor; ii) reported size in hectares; iii) nature of the investment; iv) source of the data; and v) outcome (occurrence of protest). These have been included in a separate table in the Appendix (Table of China's land-based investments by year, size and type).

The period 1949–1999: Aid, not investments

What is immediately apparent from the first world map is that before China's official proclamation of the 'going global' strategy in 2000, Chinese overseas agricultural investments in land are relatively few and geographically scattered over a handful countries. In terms of incidence most land-based investments were in Africa, where 10 investments were found. However, in terms of investment size (see: Table in Appendix), the bulk of Chinese land-based investments was actually found across the border in Cambodia. Here a total of six confirmed investments accounted for over 105,000 ha. whereas all African investments only accounted for approximately 11,000 ha.[30] Moreover, one major investment (of 43,000 ha.) has been reported for Australia in 1989, yet, the name of the investor and the type of investment are unknown (Callick 2008). Finally, we also found two investments in Latin America – in Cuba (1996) and in Mexico (1998) – together accounting for a minimum of 1,200 and a maximum of around 6,000 ha.

On the basis of this material, it appears that before overseas investments were set as national policy in 2000, China concentrated its land-based investments in the Southeast Asian vicinity. This is not to say that China was not active on the African continent, but it would be misleading to identify the earlier development aid activities as land-based investments, for which reason they are excluded from the maps.

Starting from the 1950s, China engaged in a variety of development aid projects in Africa. We discuss these because in later years a number of Chinese land-based investments built on the earlier aid projects. There are thus linkages with China's foreign land-based investments that were taking place since the late 1980s.

Chinese development aid projects began to take shape from the 1950s onwards. The projects established in those years were predominantly driven by geo-political

[29]More specifically, both the stated starting and ending year of a period includes the investments of that particular year. If an investment has no exact starting year, it has been categorized according to the date of the source that reported earliest about that investment.
[30]There are eight confirmed investments, i.e. five in Zambia (8,807 ha.), one in Guinea Bissau (1,800 ha.); one in Mauritania (638 ha.); one in Mali (500 ha.), and one unconfirmed one in Ghana (size unknown, see Bräutigam and Tang 2009).

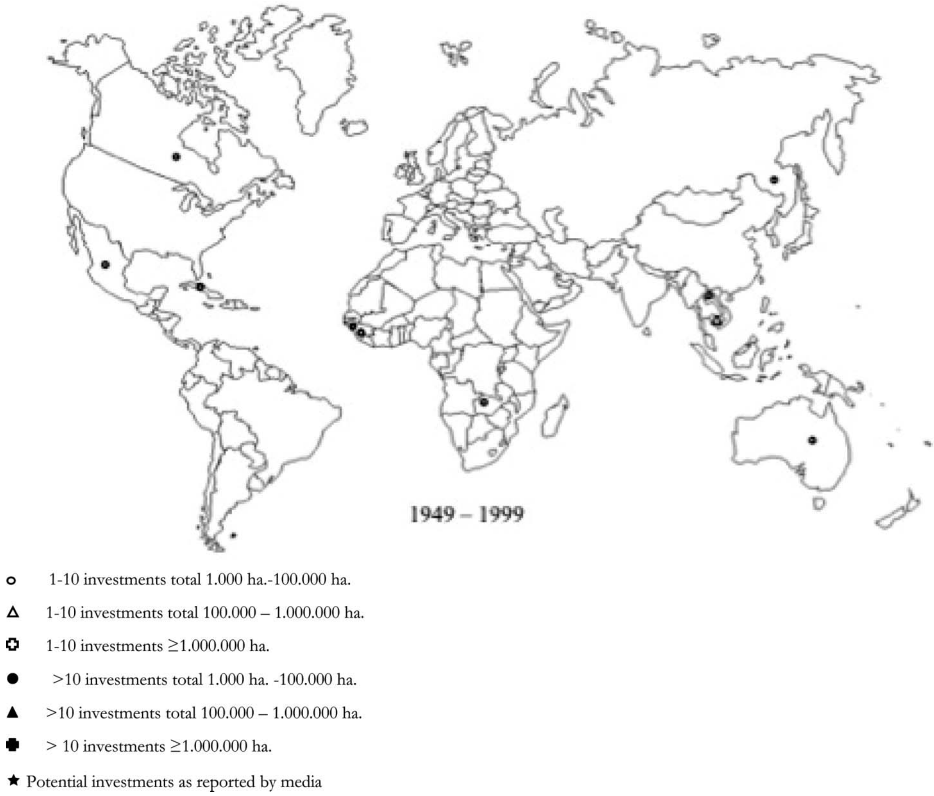

Figure 2. Chinese investments identified from 1949–1999.
Source: Drawn by the authors on basis of literature research, see footnote 29.

goals, i.e. security, political interests, and creating a sense of ‘Third World’ solidarity (Bräutigam 1998). Mao’s newly independent China urgently needed international legitimisation after 1949. Coupled with fading support from the Soviet Union after the 1950s, the Chinese government had to find other, new international allies (Bräutigam 1998, Alden and Aves 2008). The ‘one-China’ policy was a core aspect in China’s international partnerships, and the government continuously strived to solidify its international position and win a seat in the UN, then still held by Taiwan (Bräutigam 1998). Interestingly, a number of Chinese projects and investments that were implemented in different African countries were actually founded on former Taiwanese bases (see also Buckley 2011).

Over the years the number of projects fluctuated in accordance with China’s domestic political winds and related socio-economic upheaval. Political campaigns such as the Great Leap Forward (1958-1962) and the Great Proletarian Cultural Revolution (1966-1976) affected the availability of resources for foreign aid (Bräutigam 1998, Alden and Aves 2008). On the whole, there were over 120 agricultural development projects in 44 countries over the mid-1950s to mid 1980s, which accounted for approximately 15-20% of China’s African aid (Bräutigam 1998, 5, 43). These projects generally took the form of small-scale research farms in which Chinese agricultural scientists and extension agents conducted research on crop varieties, and executed demonstration and pilot projects for local people. The research farms remained under ownership of local people (Bräutigam 1998).

The beginning of Chinese president Deng Xiaoping's economic reforms in 1978 marked a shift in China's development aid rationale. As a result, the political strategic imperative of foreign aid was replaced by a more economic rationale in which projects became more commercialized (Bräutigam 1998). The implications of this shift were also noticeable at the farm level, and between the 1980s and 1990s many Chinese acquired formal ownership of the farms, while the management changed. As the farms became more profit-oriented, the Chinese managers benefited from their knowledge in the African setting which they had accumulated over the years. The farms continued to primarily supply local markets (Yan and Sautman 2010).[31] The farms that remained as successors of these former aid projects have also been portrayed in figure one.[32]

The period 2000–2008: China 'Going Global'

A marked difference between the period 2000-2008 as compared to the preceding period is the rise in the incidence of China's overseas land-based investments in Africa; in the Mekong river basin (i.e. Laos, Cambodia and Myanmar); and further down the Southeast Asian region (i.e. Indonesia, Papua New Guinea, and the Philippines). It needs to be noted that most of these investments, have occurred before the outbreak of the American credit crunch in 2007.

In Africa, a minimum of 18 new investments have been identified. An important catalyst in China's land-based investments in Africa in the period up to 2008 was the established (and still ongoing) infrastructural development by China over the past three decades. The 'infrastructure deficit' of many African countries is a major reason why Chinese land-based investments are accompanied by infrastructural investments. This marriage between infrastructure development and investment has been described by Adem as the 'formula of resources for infrastructure' (Adem 2010, 339). Chinese financial institutions are prime financiers for such projects. For instance, the China ExImBank granted soft loans to the Mozambique government to build a large dam on the Zambezi stretch, after which Chinese companies invested in land leases to establish farms and pasture areas for animal husbandry (Horta 2008).

Another new development over 2000-2008 is the extension of China's land-based investments further south into Southeast Asia. A Chinese investment of 1.24 million ha. was reported in the Philippines. However, it has been cancelled and is allegedly continued through local contractors (Grain 2008). Also notable is a new investment in Indonesia (Kalimantan) and Papua New Guinea. Here the China National Offshore Oil Cooperation (CNOOC) together with the Sinar Mas Group and the China Renewable Energy Investment Ltd., a former Chinese SOE, became involved in a one million hectare investment for cassava, palm oil and sugar production in

[31]Yan and Sautman (2010) describe this as the shift from a 'socialist mode of production' to a 'capitalist mode of production', which in fact mirrors the gradual move in China's domestic situation in that time, towards a more market-based economy (Bräutigam 1998).

[32]For instance, the Rudewa and Kisangata estates sisal farms in Tanzania, covering a total of 6,900 ha., passed into the hands of Chinese investors in 2000 (Bräutigam and Tang 2009, 697).

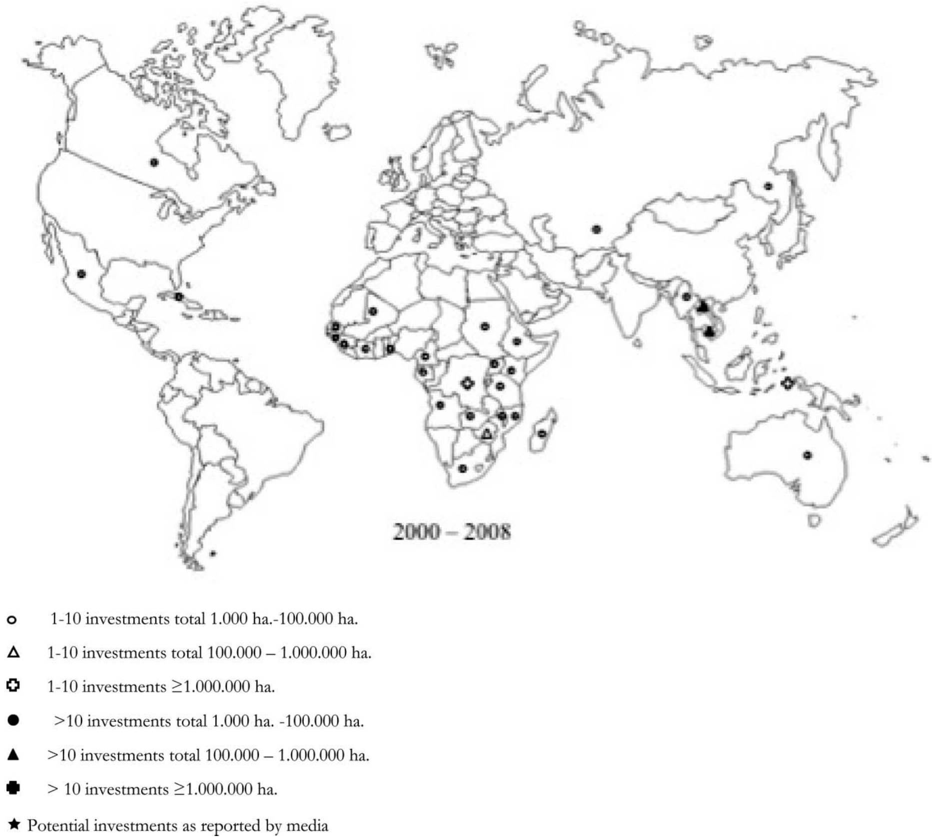

Figure 3. China's overseas land-based investments between 2000 and 2008.
Source: Drawn by the authors on basis of literature research, see footnote 29.

2007 (McCartan 2008).[33] The investments around the Mekong river basin have picked up since 2000. Apart from Cambodia, we see new ones in Laos and Myanmar. As a result, there is a total of around 25-30 confirmed new investments in the Mekong river basis (see also Table in the appendix).

This figure seems to contradict popular perception, which regards China as having concentrated its land-based investments in the African continent. The media and NGOs frequently reinforce this perception.[34] Yet, in terms of the incidence of investments, we see that popular perception can not be corroborated. Also in terms of investment size, the picture is far from consistent.

[33]The Sinar Mas Group is one of the largest Indonesian conglomerates, and was set up in 1962 by the overseas Chinese tycoon Eka Tjipta Widjaja, while the China Renewable Energy Investment Ltd. (before 2011 known as Hong Kong Energy Holdings Ltd.) is a former Chinese state company which currently operates large windmill parks in Heilongjiang, Hebei and Inner Mongolia). For more information on the China Renewable Energy Investment Ltd., see also (Bloomsberg, 2011).
[34]For instance, as Kristian blogs: 'China has been acquiring land on the cheap from African countries. (...) [U]nfair deals for kickbacks that benefit the African elite and the billion Chinese people while putting the welfare of African on the line' (Kristian 2011).

For the whole of Africa the confirmed size of Chinese land-based investments is 3.2 million ha. versus 2.24 million ha.[35] in Indonesia, Papua New Guinea and the Philippines, as well as approximately 800,000 ha. in Laos, Cambodia and Myanmar. These figures apparently confirm the image that China heavily invested in Africa after 2000. However, a major problem with the statistics is that the high African figure is caused by a single investment of three million hectares by the Chinese telecom company ZTE in the Congo. Even more problematic is that different sources mention a different size for this very same investment varying from 10,000 ha. (Bräutigam and Tang 2009, 697) to three million (Biopact 2007, Gray 2009). Based on the conservative figure provided by Bräutigam and Tang (a scientific source), the land-based investments in Africa would amount to around 200,000 ha., significantly lower than in the whole of the Southeast Asian region together.

Complicating matters is the fact that several sources have reported that the figures for the Mekong river basin may be understated because of a dual reason. First, Chinese *private* companies and individual entrepreneurs in general appear to be the main investors[36] in the Mekong river basin (Frost 2004, Frost and Ho 2005, Humphrey and Schmitz 2007, Diana 2008, Shi 2008, Rutherford *et al.* 2008, UNCTAD 2009). Due to the relatively small-scale investments by these investors, they do not require formal approval in the host countries and thus escape official statistics (McCartan 2008, Fullbrook 2010, see also UNCTAD 2009). A second reason why the incidence of investments might be understated is because an unknown part of the intra-regional trade between China and the Mekong river basin countries is informal (or even illicit) and thus unnoticed. (Frost 2004, Frost and Ho 2005, Humphrey and Schmitz 2007). Moreover, in certain cases national laws are intentionally evaded to keep the size of investments down. For example, Cambodian law stipulates a maximum size of 10,000 hectares for so-called Economic Land Concessions. However, Chinese companies have acquired land concessions under different names, effectively enabling them to obtain larger amounts of land in total (UNOHCHR 2007, Rutherford *et al.* 2008). In sum, it is crucial to deal with the statistics in a cautious manner, if one aims to have a better understanding of China's land-based investments around the world.

In 2006, the third Forum on China Africa Cooperation[37] (FOCAC) took place. Shortly before the third FOCAC the Chinese government issued its first African Policy Paper in which the main elements of the renewed Chinese approach in Africa were stipulated. During the FOCAC, the Chinese state launched a USD 5 billion China-Africa Development Fund, and a package of debt cancellation and technical cooperation (Power and Mohan 2010). These combined measures effectively paved the way for increasing Chinese public and private land-based investments in African agriculture (Yan and Sautman 2010). Furthermore, roughly around the mid-2000s, Chinese SMEs – which largely originated from rural township and village enterprises of

[35]Or one million ha. if the cancelled investment in the Philippines is not included.

[36]One of the exceptions reported over this period, is the land-based investments by the Chinese state through an opium cultivation replacement program in Myanmar, Cambodia and Laos (McCartan 2008, Diana 2008, Shi 2008). Most of the private investments originate from adjacent Chinese provinces, particularly Yunnan province, and are mostly driven by the scarcity in natural resources encountered in the region of origin. Their investments and operations are initiated relatively independent from the Chinese government (Shi 2008, Diana 2008).

[37]Previous forums on China Africa Cooperation were held in 2000 (Beijing) and 2003 (Addis Ababa, Ethiopia).

the 1990s (Ho *et al.* 2004) – had arrived at a more mature stage of development in an increasingly competitive domestic market. As a result, they were ready to look for greenfield opportunities in less developed markets abroad, such as in Africa (Gu 2001/2009).

However, despite these important measures and events, there was a drop in the incidence of Chinese land-based investments in the two years following the FOCAC. It is likely that this was due to the outbreak of the 2007 global credit crisis. The crisis hit China hardest in 2008, when GDP growth dropped with 4% to 9%, and exports dropped with 40%. Although the first half of 2009 witnessed a slowdown in exports and economic growth, the turning point for China came as early as February 2009. After the Chinese New Year, approximately 90% of the migrant workers in the province of Guangdong had once more left their villages and returned to the factories that had previously laid them off in great numbers (van Dijk 2011).

Therefore, the effects of the global credit crunch for China were confined to a short period. When examining the data, we see that China engaged in only five confirmed new investments in 2007 and two in 2008. The five investments in 2007 were in: the Congo 10,000 or three million ha.; Guinea Bissau, size unknown; Mali, 20,000 ha.; Laos, size unknown; Indonesia, one million hectares; and the Philippines, cancelled. There are two confirmed investments in 2008: Madagascar, 150 ha., Myanmar, 6,666 ha. For another two cases, both date and size have been unconfirmed (in Venezuela and Canada), while the year of the earliest reports date from 2008. By contrast, there were seven investments and one announced in 2009: Sudan 10,000 ha.; Zambia, size unknown; Tanzania, 300 ha.; Senegal, 35,000 ha., year unknown and set at year of source, while the investment could not be confirmed by field research; Malawi, size and year unknown (set at date of source); Angola, size and year unknown (set at year of source); Russia, size unknown; and Kazakhstan (announced), see table in the Appendix.[38]

The period 2009–2011: Exploring new areas

After a short-lived period when Chinese land-based investments slowed down due to the global credit crunch, they picked up again in terms of incidence, size and geographical distribution. In the period from 2009-2011, there are around 30 to 35 new and announced investments accounting for a total that varies between 350,000 to two million ha. Remarkable is the diversification in geographical terms as China has started to explore areas which hitherto had not, or almost not been targeted for investments: Latin America, the Pacific, Central Asia[39] and Eastern Europe.

Notably, there were few incidences of new investments in areas where China used to be active previously: in Africa only two (with unknown size in Ethiopia and Zimbabwe), and none in the Mekong river basin. Even the establishment of the

[38]However, the figures could also imply that in terms of investment size 2007 did not see a significant decrease due to two single investments of at least one million and a maximum of four million hectares depending on the source used.

[39]Notably in Tajikistan and Kazakhstan. Although China acquired user rights to agricultural land, the investment in Tajikistan might not be driven by the outsourcing of agricultural production. Agriculture in Tajikistan relies heavily on irrigation and the mountainous landscape is not well suited for large-scale intensive production. Therefore it is speculated that this Chinese investment is aimed at the mineral resources that the Central Asian states may offer, in particular oil and gas.

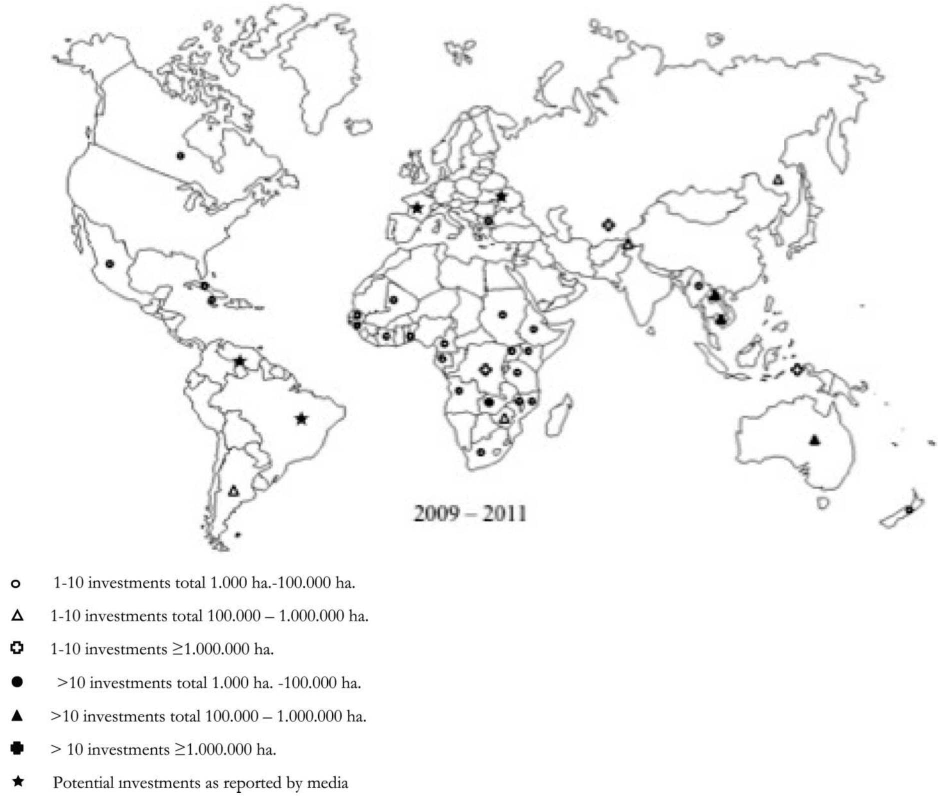

Figure 4. China's overseas land-based investments between 2009–2011.
Source: Drawn by the authors on basis of literature research, see footnote 29.

China-ASEAN Free Trade Area in the beginning of 2010[40] has had no significant effect on Chinese land-based investments in Laos, Myanmar and Cambodia yet. In addition, another interesting trend over this period, is the fact that Chinese land-based investments in agriculture have also shifted to the highly industrialized countries, such as Australia, New Zealand, and France.

This geographical shift might for a great part be caused by the negative experiences in Africa where many Chinese land-based investments did not materialize due to managerial problems or popular protest against a perceived neo-colonialist 'Yellow Peril'.[41] As a result, China redirected its investments towards less volatile and mature markets in the industrialized and emerging economies.

[40]In January 2010 the China-ASEAN Free Trade Area was established between China and ten Southeast Asian countries, including Laos, Myanmar and Cambodia, aiming to facilitate trade for all countries involved. China would benefit in terms of facilitated export of its light manufacturing industries, while the free trade area could smooth exports of the Southeast Asian countries to China in agricultural commodities and natural resources (Moore 2009, Wuthnow 2008).

[41]This is not the sole explanatory factor, as also the changing consumption pattern in China is visible in these investments in vineyards (Australia, Bulgaria and France), cattle farms, dairy farms and orchards (Australia and New Zealand). While rising domestic demand for wine and beef has obviously driven the investments in vineyards and cattle farms, the investments in dairy might also have other reasons. Recent food safety scandals, such as the 2008 San Lu infant milk incident, have had and continue to have significant impact on the Chinese dairy sector (The Economist 2008).

Concluding observations: Rethinking the Chinese 'land grabs' discourse

The discourse over China's 'land grabs' has become highly politicized and split over issues of 'neo-colonialist' exploitation versus 'win-win' opportunities and 'new economic diplomacy'. We postulated that this discourse is disjointed from, and not sufficiently informed by the available empirical data. To validate this postulate, we started out by describing the camps that are pitted against each other. Rather than choosing sides in the 'land grabbing' discourse or jumping to definitive conclusions, would we like to fathom and capture the complexity of China's global land-based investments.

We have attempted to do so by analyzing the existing data and material, and by describing the development of Chinese foreign land acquisitions along four dimensions: 1) incidence, 2) investment range, 3) timing (i.e. 1949–1999; 2000–2008; 2009–2011), and 4) geographical location. For a comprehensive overview, we also included a table with additional indicators, i.e. investor, nature of investment, exact size in hectares, outcome, and data source. Based on our analysis, three dimensions became immediately evident:

(i) the available data on China's land-based investments are highly inconsistent, fragmentary and, at times, completely absent;
(ii) data quality is a critical issue: there is a lack of in-depth research 'on the ground' through qualitative fieldwork and quantitative surveys;
(iii) Lastly, there are few scientific sources: of a total of over 90 sources that we identified and reviewed, only three have been published through international, academic peer review (see Table in Appendix).[42]

An interesting feature of China's overseas land-based investments is what we described as '*developmental outsourcing*' – a state-guided, or at least, state-facilitated process of off-shoring. The developmentalist nature of Chinese outsourcing is apparent in spatial-temporal ways. State measures, in particular the 'Going Global' policy and the establishment of the FOCAC, both in 2000, have played a major role in driving Chinese overseas land-based investments, which were few and fragmented before its proclamation. Moreover, evident geographical waves can be distinguished over time, starting out from the bordering nations in Southeast Asia, then to Africa, and recently to regions hitherto untargeted by Chinese land-based investments. The marked rise in the incidence and investment size of China's overseas land-based investments shortly after the proclamation of its 'Going Global' policy in 2000, is beyond doubt.

Yet, contrary to common perception, the bulk of Chinese investments over 2000–2008 did not go to Africa, but to Southeast Asia. In this respect, it is important to make a distinction between the incidence and the size of investments. There is a clear rise in the incidence of Chinese land-based investments in Africa, but the picture in terms of investment size is murkier. For the whole of Africa the reported size of Chinese land-based investments is around 3.2 million ha. versus 0.5 to 1.5 million ha. in Southeast Asia (figure depends on the in/exclusion of an unclear investment in Indonesia). These figures apparently confirm the image that China heavily invested in Africa after 2000. However, a major problem with the statistics is that the high African figure is caused by a single investment of three million hectares in the Congo. More problematic is that different sources mention a different size for the same investment

[42] Of the three scientific sources, two have in fact been published in an ISI-rated journal.

(by the Chinese telecom company ZTE). Whereas the media report three million ha. (Biopact 2007, Gray 2009), the only scientific source on this issue mentions 10,000 ha. (Bräutigam and Tang 2009, 697). Based on the conservative figure, the land-based investments in Africa would amount to around 200,000 ha., significantly lower than even the lowest estimate (0.5 million ha.) for Southeast Asia.

According to Oxfam internationally 'as many as 227 million hectares of land (. . .) has been sold or leased since 2001' (Oxfam 2011, 2). Oxfam claims that of these 227 million, 70% or approximately 160 million has taken place on the African continent. When this figure is juxtaposed with our findings of a maximum size of three million ha. by Chinese investors, the question arises who 'grabbed' the remaining 155 million ha. or so in Africa?

The answer to this question might have two implications: for one, we might have to rethink the dominant discourse that Chinese are among the prime agricultural land investors worldwide. Or perhaps, we should start to cast serious doubt about the rigor of the current counting and calculation of foreign land acquisitions.

The difficulty in determining the exact investment size is caused by the fact that a substantive proportion of announced investments does not materialize due to a variety of reasons, such as management and implementation problems, unused loan facilities, and opposition driven by fears of a 'China taking over'. This issue has also been signalled by other authors (Scissors 2010, Bräutigam and Tang 2009, Yan and Sautman 2010). As a result, the Chinese state and corporate sector were prompted to look for new investment opportunities elsewhere.

Whereas before 2009, China hardly invested in Latin America, new investments were announced by the media and NGOs since then, more specifically in Argentina and Brazil (Borras *et al.* 2011). However, it remains to be seen if these investments will be implemented, or if a similar scenario will unfold as in the African case. As Scissors forecasted (2010, 3): 'a previous rush into sub-Saharan Africa saw promised investments and contracts that did not materialize. To some extent, this will happen in South America as well.' Probably for exactly this reason, we also see a shift in China's land-based investments to more mature – and in Chinese eyes less risky[43] – markets in industrialized nations, such as in Canada, Australia, New Zealand and France.

China's socio-economic and political rise in the world seems to incite either fear or euphoric expectations. Yet, neither fears for an expansionist 'Yellow Peril', nor euphoria about China as an economic powerhouse that can rewrite development and save the Euro-zone in one go (Grammaticas 2011), are helpful when it comes to understanding China's global role and impact, with particular reference to its alleged 'land grabs'. For one thing, what is portrayed as property theft might boil down to an amalgam of different legal-institutional arrangements varying from (long) lease to concessionary rights and preferential loans. Furthermore, while China is seen as a monolithic, homogeneous actor in land-based investments, it is in fact composed of a variety of actors ranging from state-owned, collectively-owned, private, and individual entities with different activities and interests. Lastly, China is also not the sole actor in land-based investments – as other economies, industrialized and emerging ones alike – face similar problems of food and energy security. Yet, as China's actions and moves around the world are often held under a 'global magnifying glass', these are also among the first ones to be noticed. Less known are

[43]Although China might currently be of a different opinion with the Euro crisis raging through the European Union, and affecting much of the rest of the industrialized world.

the increasing numbers of agricultural investments taking place intraregionally and within countries. 'Land grabbing (. . .) to include foreign and domestic capital – is underway in far more countries in Latin America and the Caribbean than previously assumed' (Borras *et al*. 2011, 16). A major group of investors here pertain to national and domestic elites, and (Trans-) Latina Corporations (LTCs) (Borras *et al*. 2011).

The phenomenon of world-wide land-based investments is like other processes of globalization likely to feature multiple layers, that constitute a highly complex, and at times, downright contradictory reality. Accounting for complexity, rather than thinking in terms of simplified metaphors whether they be 'win-win opportunities' or 'neo-colonial, expansionist land grabs', might be a better way to get to grips with that reality.

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Irna Hofman is M.Sc. Environmental Sciences. She graduated from Wageningen University and later on conducted research in Central Asia as a rural sociologist. Her work and interests are focused on agrarian and social change, rural sociology and transition economies. She is a Ph.D. student and research assistant of prof. Peter Ho at Leiden University as a research assistant of Prof. Peter Ho. Her current research activities focus on the governance of foreign land acquisitions with particular attention to Chinese investors. Email: i.hofman@hum.leidenuniv.nl.

Peter Ho is Full Professor of Chinese Economy and Development and Director of the Modern East Asia Research Centre at the University of Leiden, The Netherlands. He has published numerous SSCI-rated articles on sustainable and rural development in China. His recent books are Institutions in transition (Oxford University Press, 2005), Developmental dilemmas (Routledge, 2005), China's limits to growth (Blackwell, 2006), Leapfrogging development in Asia (Nova Science, 2008), and China's embedded activism (Routledge, 2008). Ho has published extensively on sustainable and rural development, poverty and social inequality, environmental conflict and ethnic minorities in China. He has published widely in the leading journals of Development and Environmental Studies. Peter Ho was awarded the prestigious Grant for Consolidators by the European Research Council of the European Union in 2011. Corresponding author: p.p.s.ho@hum.leidenuniv.nl.

List of Abbreviations

ASEAN	Association of Southeast Asian Nations
CDB	China Development Bank
CIC	China Investment Corporation
CSFAC	China State Farm Agribusiness Corp
FDI	Foreign Direct Investment
FAO	Food and Agriculture Organization (United Nations)
FOCAC	Forum on China Africa Cooperation
IFAD	International Fund for Agricultural Development
NGO	Non Governmental Organization
RMB	Renminbi
SME	Small and Medium-sized Enterprise
SOE	State-Owned Enterprise
SWF	Sovereign Wealth Fund
UNCTAD	United Nations Conference on Trade and Development
UNOHCHR	United Nations Office of the High Commissioner for Human Rights
USD	United States Dollar
WTO	World Trade Organization

Appendix: Table of Investments

Appendix: Chinese foreign investments per country, ranked by continent, country, year[1]

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
Africa						
Angola	n.a.	n.a.	n.a.	Production of different (luxurious) food commodities	Horta 2009, Hasenfuss 2011	No
Benin	Complant International Sugar Industry Co. Ltd.	4,800 ha.	2004	Local farmers cultivate manioc for sugar processing Current status is unclear (see footnote).	Nonfodji 2011	Yes
	China National Agr. Development Corp.	n.a.	Year unknown, assumed 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702	No
Cameroon	IKO Ltd. (Shaanxi Land Reclamation General Corp.	14,000 ha.	2006	Experimentation farm, maize, rice, manioc, vegetable production	Arte Reportage 2009, Grain 2010	Yes
		n.a.	Year unknown, assumed 2006-2009	Agricultural Technology Demonstration Centre	Brautigam and Tang 2009, 702	No
Congo	ZTE	Unclear	2007	Palm oil plantations (Reported size varies 10,000 ha. to 3,000,000 ha.)	Gray 2009; Bräutigam and Tang 2009, 697;	No
	Academy of Tropical Agricultural Tech.	n.a.	Year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Naulin 2009; Bräutigam and Tang 2009, 702	No
Côte d'Ivoire	n.a.	n.a.	n.a.	n.a.	Spencer 2008	No

(continued)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
Ethiopia	ZTE	n.a.	n.a.	n.a.	Sudan Tribune 2010	No
	Guangxi/Bagui Agricultural Tech. Co.	n.a.	Year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702	No
Gabon	Eastern Agricultural Development Company	n.a.	n.a. (planned)	n.a.	Bräutigam and Tang 2009, 697	No
Ghana	China Agriculture Livestock and Fisheries Corporation; Cocoa Intern. Co. Ltd.	n.a.	1997	Current status unknown, 'apparently bankrupt' (Bräutigam and Tang 2009, 697)	Bräutigam and Tang 2009, 697, China.org.cn 2003	No
Guinea Bissau	CSFAC: Sino-Guinea Agr. Corp.& Development Co. and Koba Farm	1,800 ha.	1996	Hybrid rice cultivation centre, collaboration with China Hybrid Rice Engineering Research Centre	Bräutigam and Tang 2009, 697; China.org.cn 2003; Horta 2008	No
	Chinese private investment (USD 60 Million)	n.a.	2007	Cash nut industry	Horta 2009	No
Kenya	n.a.	n.a.	n.a.	n.a.	Spencer 2008, Patton 2008, Hasenfuss 2011	No
Liberia	Hunan/Yuan Longping High-Tech Co.	n.a.	Year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702	No

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
Madagascar	Complant International Sugar Industry Co. Ltd.	n.a.	n.a.	Sugar project, current status unknown (see footnote 2)	Bräutigam and Tang 2009, 699	No
	Weichu Madagascar Agr. Development Company	150 ha.	2008	Hybrid rice cultivation. Status unknown. Landowners withdrew from contract and Weichu replaced its rice fields (Furuya 2010)	Furuya 2010	Yes
Malawi	n.a.	n.a.	n.a.	n.a.	Horta 2009	No
Mali	Sikasso Tea Complex	500 ha.	1995	Tea plantations and factory	Bräutigam and Tang 2009, 692, Le Gouvernement de la République	No
	China Light Industrial Corp. Foreign Economic & Technical Cooperation	20,000 ha.	2007	Construction of sugar factory and land for agricultural production	du Mali 2009, Bunting 2010	No
Mauritania	Zhongnong Mauritania Agriculture Co. Ltd., M'Pourie rice farm	638 ha.	1999	n.a.	Bräutigam and Tang 2009, 697; Yan and Sautman 2010	No
Mozambique	Hubei/Lianfeng Overseas Agr. Dev. Co.	n.a.	year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702	No
	n.a.	n.a.	2007	Large land leases and various farms, Hunan Hybrid Rice Institute, loans by ExIm Bank, production destined for Chinese market	Bräutigam and Tang 2009; Horta 2009/2008, von Braun and Meinzen-Dick 2009, Makoni 2009	Yes

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
Nigeria	Chongqing Seed Corp	n.a.	n.a.	Small rice production	The Guardian 2008	No
Rwanda	Fujian/Agriculture and Forestry University	n.a.	Year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702	No
Senegal	Datong Trading Enterprise (DTE)	Reported size varies 35.000 ha. –60.000 ha.	n.a.	Sesame farming construction of factory. Investment unconfirmed in field (Buckley 2011, 11).	Lewis 2009, Naulin 2009, Shun 2008, Bui 2008	No
	Chinese authorities	n.a.	2006	Agricultural Technology Demonstration Centre	Buckley 2011	Positive and Negative
Sierra Leone	Complant International Sugar Industry Co. Ltd.	n.a.	Year unknown, assumed before 1990	Magbass Sugar Complex: Turn-key project handed over to Chinese managers. Operational until 2007, status unknown	Bräutigam and Tang 2009, 699	Yes
South Africa	CSFAC	n.a.	n.a.	Co-operative ostrich project (planned)	Bräutigam and Tang 2009, 697; China.org.cn 2003	No
	China National Agr. Development Corp.	n.a.	Year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702	No
Tanzania	Rudewa/Kisangata estates	6,900 ha.	2000	Two sisal farms, former Chinese aid projects, taken over by Chinese investors after 2000	Bräutigam and Tang 2009, 697; China.org.cn 2003	No

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
	Chongqing Seed Corp	300 ha.	2009	Rice cultivation and processing, supply Chinese market	China Daily 2008, The Guardian 2008	No
	Various SOEs/ private enterprises	80 ha. –5,000 ha.	n.a.	Various farms, agriculture and animal husbandry: supply local markets	Marks 2008, Yan and Sautman 2010, Horta 2009	No
	Chongqing/Agr. Tech Co.	n.a.	Year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702	No
Togo	Zhongken Agriculture Development Company	300 ha.	n.a.	n.a.	Bräutigam and Tang 2009, 697; China.org.cn 2003	No
	Jiangxi/Huachang Infrastructure Construction Co.	n.a.	Year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702	No
Uganda	n.a.	10,000 ha.	n.a.	n.a.	Spencer 2008, Patton 2008, Hasenfuss 2011	No
	Sichuan/Huaqiao Fenghuang Group (Fisheries)	n.a.	Year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702	No
Zambia	China-Zambia Friendship Farm (cooperation SOEs)	667 ha.	1990	Wheat, maize, soybeans, commercially oriented, supply local markets	Bräutigam and Tang 2009, 697; Yan and Sautman 2010, 316	No
	Zhongken Estates Ltd./Zhongken (CSFAC)[2]	3,573 ha.	1992	Wheat, maize, chicken eggs, commercially oriented, supply local markets	Bräutigam and Tang 2009, 697; Yan and Sautman 2010, 316	Some dis-agreement

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
	Zhongken Friendship Farm Ltd. (CSFAC)	2,600 ha.	1999	Maize, wheat, later animal husbandry, commercially oriented supply local markets	Yan and Sautman 2010, 316	No
	Xiyangyang (Jiangsu State Farms Corp (provincial SOE, JSFC)	40 ha.	1999	Wheat, maize, cabbage, commercially oriented supply local markets	Yan and Sautman 2010, 316	No
	Zhonghua (JSFC)	1,400 ha.	1999	Maize and cattle, commercially oriented supply local markets	Yan and Sautman 2010, 316	No
	Yangguang (JSFC)	80 ha.	2004	Maize, wheat, commercially oriented supply local markets	Yan and Sautman 2010, 316	No
	Jilin/Agricultural University	n.a.	Year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702; Yan and Sautman 2010	No
	Several (private) Chinese owned[3]	Sizes range 40-4,100 ha.	n.a.	See endnote 3	Yan and Sautman 2010	No
	Chinese government/ Wuhan Kaidi Holdings	Reported size ranges from 70.000 ha. (Yan and Sautman 2010) to 2.000.000 ha. (Smith and Talbot 2009)	n.a.	Request for land, jatropha production.	Yan and Sautman 2010, Smith and Talbot 2009, Cotula et al. 2009	Yes

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
	China Jiangxi Huachang Infrastructure Engineering Company	n.a.	n.a.	Establishment of big farm in Nansanga	Yan and Sautman 2010, 315	No
	Yuan Longping High-Tech. Agriculture Company	n.a.	n.a.	Agricultural farm bloc and science high-tech park	Times of Zambia 2010	No
Zimbabwe	China International Water and Electric Corporation	±100,000 ha. (250,000 acres)	2003	Corn production[4]	Meldrum 2003, Bräutigam and Tang 2009	No
	China National Tobacco Company Limited	n.a.	n.a.	Production of tobacco for Chinese consumption, through contract farming arrangements with local farmers	Bräutigam and Tang 2009, 706	No
	Research Institute of China Agricultural Mechanization	n.a.	Year unknown, 2006-2009	Agricultural Technology Demonstration Centre	Bräutigam and Tang 2009, 702	No
	Hebei Province	n.a.	2011	25-year renewable twinning programme, contract farming arrangements with local farmers	Chifamba 2011	No
	Potential investment Beidahuang Group	n.a.	n.a.	n.a.	ABC News 2011	No

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
Russia's Far East and Central Asia						
Kazakhstan	Sun Time International Techno-Economic Cooperation/ Xinjiang	7,000 ha.	2003	3,000 Chinese farmers cultivate soybeans, wheat and animal husbandry. Current status unknown.	China Daily 2003, Grain 2008, Callick 2008	No
	n.a.	1,000,000 ha.	n.a.	Production of soybean and rapeseed: Supposed cancellation 2009/ 2010. Alternately creation of a joint agricultural manufacture	Kazakhstan Today 2009, RFERL 2011, Paxton 2011	Yes
Russia	n.a.[5]	n.a.	n.a.	Vegetables and soybean production for local markets	Callick 2008, The Guardian 2008, Grain 2008	No
	Company from Heilongjiang	42,000 ha.	2004	n.a.	China Daily 2008, Grain 2008	No
	Heilongjiang Province[6]	426,667 ha.	2010	Agriculture	Xinhua 2010	No
	Mudanjiang municipality	146,667 ha.	Year unknown, assumed before 2010	Agriculture and feed mills and lipid-processing plants	Xinhua 2010	No
	Baoqing Farm	5,000 ha.	n.a.	Lease of cropland in Jewish autonomous oblast by a Chinese businessman	Grain 2008	No

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
	Potential investment Beidahuang Group	n.a.	n.a.	n.a.	ABC News 2011	No
	Agrofirma Altay Ltd.	n.a.	n.a.	Private company, a Chinese entrepreneur who operates in Altay (USD 1.5 million)	Visser and Spoor 2011, 302	No
	Fuchan-Altay Ltd.	n.a.	n.a.	Private company, a Chinese entrepreneur who operates in Altay	Visser and Spoor 2011, 302	No
	Van-Uan-Plotava Ltd.	n.a.	n.a.	Private company, a Chinese entrepreneur who operates in Altay	Visser and Spoor 2011, 302	No
Tajikistan	Xinjiang Uygur Autonomous Region	2,000 ha.	2011	Cotton and rice fields farmed by Chinese farmers	Pannier 2011	Yes
	n.a.	110,000 ha. (reported size 1,100 km2)	2011	n.a.	Pannier 2011	Yes
Southeast Asia						
Cambodia[7,8]	Cambodia Haining Group Co. Ltd.	23,000 ha. Assumed initial size 21.250 ha.	1998	Castor oil plant and multi-agriculture	UNOHCHR 2004, 50/2007, 27	Yes
	The Green Rich Co. Ltd.[9]	60,200 ha.	1998	Oil palm and acacia	UNOHCHR 2004, 52/2007, 30	Yes
	China Cambodia State Farm International	7,500 ha.	1998	Agro-agriculture, animal raising	UNOHCHR 2004, 52	No

(*continued*)

Appendix: Chinese (*Continued*).

Name investor	Size	Year signed	Description	Source(s)	Civil society protest
Henan (Cambodia) Economic & Trade Development Zone	4,100 ha.	1999	Agricultural crops and animal husbandry	UNOHCHR 2004, 50/2007, 27	Yes
Flour Manufacturing Co. Ltd.[10]	7,400 ha.	1999	Teak tree	UNOHCHR 2004, 53	Yes
Ratana Visal[11] Development Co. Ltd.	3,000 ha.	1999	Cashew nut	UNOHCHR 2004, 54	Yes
China National Corporation for Overseas Cooperation Laostar Development Co. Ltd.[12]	8,000 ha. Iniital size 14.000 ha.	2000	Agro-industrial crops	UNOHCHR 2004, 50/2007, 28	Yes
Kimsville Corp[13]	3,200 ha.	2000	Cassava	UNOHCHR 2007, 27	No
Cam Chi international[14] Agriculture Development	26,500 ha.	2000	Cassava, corn, fruit crops, animal raising	UNOHCHR 2004, 54	No
Cambo Victor Investing[15]and Developing Co. Ltd.	26,550 ha.	2001	Agricultural crops	UNOHCHR 2007, 28	No
China Evergret[16] Cambodia Agriculture Development	4,000 ha.	n.a.	Silk worms, corn, vegetables, rice	UNOHCHR 2004, 52	No

(*continued*)

Appendix: Chinese (*Continued*).

Name investor	Size	Year signed	Description	Source(s)	Civil society protest
GG World Group (Cambodia) Development Ltd.	5,000 ha.	2005	Teak, fruit trees, sandalwood	UNOHCHR 2007, 24	Yes
Wuzhishan LS Group Co. Ltd.[17]	10,000 ha.	2005	Indigenous pine	UNOHCHR 2004/2007, 27	Yes
Grand Land Agriculture Development (Cambodia) Co. Ltd.	9,854 ha.	2006	Teak and other trees	UNOHCHR 2007, 24	Yes
Phou Mady Investment Group	9,854 ha.	2006	Teak and other trees	UNOHCHR 2007, 24	Yes
Asia World Agricultural Development (Cambodia) Co. Ltd.	10,000 ha.	2006	Indigenous teak	UNOHCHR 2007, 25	Yes
Great Asset Agricultural Development (Cambodia) Limited	8,985 ha.	2006	Fang lean tree (pistachio)	UNOHCHR 2007, 25	Yes
Great Wonder Agr. Development (Cambodia) Ltd.	9,231 ha.	2006	Fang lean tree (pistachio)	UNOHCHR 2007, 25	Yes

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
Indonesia	CNOOC/Chinese CITIC Group	Unclear: 1.000.000 ha. (McCartan 2008) to 1.800.000 ha. (van Gelder 2005)	2007	Palm oil, cassava, sugar; with Sinar Mas & Hong Kong Energy Ltd.; 18 oil palm plantations	Mc Cartan 2008, Gray 2009, Van Gelder 2005	Yes
	Interest from Chinese palm oil businesses[18]	n.a.	n.a.	Oil palm plantations	Colchester 2011	No
Laos	Mengpeng Sugar Manufacturing Co. Ltd.	n.a.	1994-2008 (operational)	Sugar cane, contract farming arrangements with local farmers	Diana 2008, 13,14	Positive/ Negative
	Shengli	2,000 ha.	2004	Rubber plantations, contract farming arrangements	Shi 2008, 16	Some disagreement
	Zhenhua	3,000 ha.	2004	Rubber plantations, contract farming arrangements	Shi 2008, 16	No
	Chongqing municipal government	5,000 ha. Cultivation planned on 200.000 ha.	2004	Agricultural park including seven agricultural programs	Xinhua 2004	No
	Jiachuang	2,000 ha.	2005	Rubber plantations, contract farming arrangements (2007: involved in corn production (see Diana 2008)	Shi 2008, 16; Diana 2008, 13, 14	No
	Chongqing Seed Corp	n.a.	2005	Rice cultivation	China Daily 2008, The Guardian 2008	No
	ZTE	100,000 ha.	2005	Cassava production	Fullbrook 2010	No
	China-Lao Ruifeng Rubber Company	300,000 ha.	2006	Rubber plantations	Shi 2008, 16; Gray 2009	Yes

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
	Yunnan Agricultural Plantation Group/Yunxiang Investment Co. Ltd./Yunnan Province[19]	Unclear: 333.333 ha. (500,000 mu) (Yang 2008), to 166.667 ha. (Shi 2008, Fullbrook 2010)	2006	Natural rubber planting demonstration bases, rubber production for domestic use, rubber processing manufactory technical training centre.	Yang 2008, Shi, 2008, Fullbrook 2010	Positive & Negative
	Lao-Yunnan Power Biological Products Company Ltd.	n.a.	2006-2008 (operational)	Cassava production, contract farming arrangements	Diana 2008, 13, 14	Positive & Negative
	Tonglu-Jinggu[20](joint venture)	6,350 ha.	n.a.	Rubber plantations, contract farming arrangements	Shi 2008, 16	No
	Taijiang	1,004 ha.	2006	Rubber plantations, contract farming arrangements	Shi 2008, 16	No
	Diyuan	17,500 ha.	2006	Rubber plantations, contract farming arrangements	Shi 2008, 16	Yes
Myanmar	Yunnan Agricultural Plantation Group/Yunxiang Investment Co. Ltd.	$\pm$6,666 ha. (100,000 mu)	2008	Development agreement for rubber planting with Monbo County. Several private owned enterprises and plantation staff	Yang 2008	No
	Ho Nan Ching	n.a.	Year unknown, assumed between 2000 and 2009)	Rubber concession	Yang 2008, Gray 2009	Yes
	Yunnan Honyu	n.a.	n.a.	Rubber concession	Yang 2008, Gray 2009	Yes
	n.a	n.a.		Oil palm plantations	IRIN 2009a	Yes

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
Philippines	Government and private sector	1.24 million ha.	2007: investments suspended	Agricultural production	Padilla 2007, Grain 2008, Abella 2010	Yes
	Potential investment Beidahuang Group	n.a.	n.a.	n.a.	ABC News 2011	No
Northern America						
Canada	n.a.	n.a.	n.a.	Mushroom production. Current status unknown	Callick 2008	No
	Potential investment Beidahuang Group	n.a.	n.a.	n.a.	ABC News 2011, Dow Jones 2011	No
Central and South America						
Argentina	Beidahuang Group	320,000 ha.	2010	Agriculture, various crops (soy, wheat, barley, sunflowers)	Grain 2011, La Nacion 2010, Borras *et al.* 2011, 24	Yes
Bahamas	n.a.	n.a.	2010: Consultation/ cancellation	Intended large-scale farming and processing vegetables/fruit and livestock	Smith 2010	Yes
Brazil	Potential investment (Beidahuang Group)	n.a.	n.a.	High interest in large scale soy bean production	ABC News 2011, Dow Jones 2011, Barrinuevo 2011, Borras *et al*. 2011, 24	Yes
Cuba	Sun Time International Techno-Economic Cooperation	Unclear: varies from 150 ha. (Xinhua 2004) to 5.000 ha. (Grain 2008).	1996	Sino-Cuba rice production joint venture	Grain 2008, Xinhua 2004, The Guardian 2008	No

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
Jamaica	Complant International Sugar Industry Company Ltd.	Unclear	2010	Acquisition of three sugar factories and attendant lands, additional lease of land for cane production (Size > 12,000 ha.)	Jamaica Gleaner 2010	No
Mexico	Sun Time International Techno-Economic Cooperation	1,050 ha.	1998	Rice production	Xinhua 2004, Callick 2008	No
Trinidad and Tobago	Guangdong Agricultural Machinery Research Institute	n.a.	Year unknown, assumed between 2009 and 2010	Joint programme National Foodcrop Farmers' Association, establishment of seven farms (size 100–300 acres (40–120 ha.)	InfoChangeIndia 2010	No
Venezuela	n.a.	n.a.	n.a.	Bilateral agreement to enhance rice production	The Guardian 2008	No
	Potential Investment Beidahuang Group	n.a.	n.a.	n.a.	ABC News 2011	No
The Pacific						
Australia	Chinese SOE	43,000 ha.	1989	n.a.	Callick 2008	No
	Metro Meat (backed by CITIC Group)	n.a.	n.a.	Cattle farming	Jimenez 2009	Yes
	Bright Food Corp	n.a.	2009	Failed bid (AUD 1 billion) on Sucrogen/ Sugar Australia (CSR) and interest in dairy and wine assets	Ooi 2010, Crittenden 2010, Myers 2010	No

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
	Beijing Sanyuan Dairy Co.	n.a.	n.a. (reported: 'recently signed')	Dairy farm in West Australia	Sainsbury 2011	No
	Qiantang Group (Zhejiang)	n.a.	2010	Orchard farms in Tasmania	Sainsbury 2011	No
	Shan Shan Group (Zhejiang)	n.a.	2010	Vineyard in New South Wales	Sainsbury 2011	No
	Shanghai Yanlong International Trade	n.a.	2010	Tasmanian spring water	Sainsbury 2011	No
	SOE China Oil and Food Cooperation	n.a.	2011	18-20 shares in Tully Sugar Mill through local subsidiary 'Top Glory Australia Pty Ltd.'	Dixon 2011	No
	New Hope	n.a.	2011	Shown interest	Sainsbury 2011	No
	Nexis Holdings (Hong Kong)	4,060 ha.and 50 ha.	2010/2011	AUD 25 million investment in 'Yalanga' property and Coast Macademia (AUD 20 million)	Noosanews 2011	No
	n.a./Beidahuang Group (potential)[21]	80,000 ha.	2011	Agriculture (produce destined for Chinese market)	Hinkley 2011	No
		n.a.	n.a.	Grain and dairy farms	ABC News 2011	Positive & negative

(*continued*)

Appendix: Chinese (*Continued*).

	Name investor	Size	Year signed	Description	Source(s)	Civil society protest
New Zealand	Natural Dairy NZ Holdings Ltd./ Shanghai Pengxin International Group	n.a.	2010/2011	Acquisition of bankrupt Crafar Farms: 16 farm units. First Chinese bid was rejected	TVNZ 2010, Scherer 2011, NZ Herald 2010, Crittenden 2010	Yes
	Bright Food Corp	n.a.	2010	Purchase of NZ Synlait (large NZ dairy processing company) with 15 independent farms	Myers 2010	No
West and Eastern Europe						
Bulgaria	Tianjin State Farms Agribusiness Group Co.	10,000 ha.	n.a.	Corn and fodder crops for the Chinese market	Konstantinova 2011	No
	Dynasty Fine Wines Group Ltd.	n.a.	n.a.	Winery/vineyard	Konstantinova 2011	No
France	Potential investment	n.a.	n.a.	Investments in vineyards	Lucas and Daneshkhu 2011	No
Ukraine	Potential investment	n.a.	n.a.	Agriculture	Stack 2011	No

[1]Note that Chinese investments of which a year and size are unknown (such as Angola, Kenya, Côte d'Ivoire) are indicated on the maps as investments between 1.000 ha. and 100.000 ha.; we have based the year/period of investment on the year of reference. Cancelled investments (Bahamas) and investments that do not exceed 1.000 ha. according to the description (Nigeria) have not been included in the figures.
[2]According to Yan and Sautman (2010), Zhongken ('Johnken') was established in 1994, on 4,100 ha.
[3]By 2006, there were 20 private and state-owned farms that comprised over 10,000 ha. (Bräutigam and Tang 2009). Total 30 Chinese owned (SOEs and private) by 2009 (Yan and Sautman 2010) See also China.org.cn 2003, Horta 2009, Marks 2008.
[4]The company suspended the operation when the Zimbabwean government was unable to pay (Bräutigam and Tang 2009).
[5]As stated by Callick (2008): 'Chinese companies are involved'.
[6]According to Grain (2008) total Chinese land acquisitions in Russia comprised 80,400 ha. by 2008 (see also Visser and Spoor 2011, 302). A part of the agricultural produce is exported to China (Grain 2008).
[7]While the UNOHCHR (2007) does not provide details on each concession listed in the rapport, the rapport states that concerns have been raised by local communities in relation to many of the Economic Land Concessions (ELCs) named in the report (UNOHCHR 2007).
[8]Most of these listed Chinese investments in Cambodia are based on UNOHCHR 2007 and UNOHCHR 2004. Our list is composed of companies assumed to be Chinese,

based on the nationality of the director (according to UNOHCHR 2007) or shareholders as listed by the 2004 report of the UNOHCHR. Note that (due 2007) some investments are not identified on the ground, or not implemented. Furthermore, the UNOHCHR 2007 provides a list of cancelled Economic Land Concessions. Since nationality of directors/shareholders is absent in that table we have not included them here.

[9]According to the UNOHCHR (2004) the Green Rich is 100% owned by Taiwanese shareholders. The report of the UNOHCHR (2007) informed that the director is Chinese, that is why we have included the company in our table. Furthermore, while the UNOHCHR reported in 2004 that the concession of the Green Rich has reduced from 60,200 ha. to 18,300 ha. (UNOHCHR 2004), the more recent report of 2007 states again that the concession involves 60,200 ha. (UNOHCHR 2007).

[10]50% Chinese shareholders, 50% Cambodian (UNOHCHR 2004).

[11]29% Chinese shareholders, 71% Cambodian (UNOHCHR 2004).

[12]A joint venture with 49% Chinese shareholders, 51% Cambodian (UNOHCHR 2004).

[13]According to the UNOHCHR (2004) Kimsville Corp is 100% owned by the United States. The report of the UNOHCHR (2007) informed that the director is Chinese, that is why we have included the company in our table.

[14]A joint venture with 50% Chinese shareholders, 50% Cambodian (UNOHCHR 2004).

[15]According to the UNOHCHR (2004) the shareholders of Cambo Victor are Taiwan (95%) and Cambodia (5%). Due 2007 the director is Chinese (UNOHCHR 2007), that is why we have included the company in our table.

[16]A joint venture with 93.9% Chinese shareholders, 6.10 % Cambodian (UNOHCHR 2004).

[17]Gray (2009) reported on a case of the Chinese company Pheapimex-Wuzhishan. Assumingly these were two separate companies before, since the UNOHCHR (2004) noted that Pheapimex and Wuzhishan shared the same office in Phnom Penh.

[18]Based on references from 2005 by Colchester (2011): 'Artha Graha, Sampoerna Cooperate with Chinese investors in Agrobusiness', Antara 18 July 2005; ' China Plans Oil Palm Plantations in Kalimantan', Antara 9 August 2005, 'Chinese Consortium Eyes Business in Indonesia's Palm Oil Sector', Antara 25 April 2005; China Bangun Kebun Sawit Senilai USD8 miliar', Bisnis Indonesia 9 August 2005; 'Chinese Investors eye RI palm oil sector', Jakarta Post June 9th 2005; 'RI inks USD7.5 bn in deals with China', Jakarta Post 30 July 2005; 'Ambalat is Ours', Tempo 16-22 August 2005.

[19]Since mid-2000 a boom of Chinese agribusinesses invests in Laos, backed by Chinese government (Yunnan province), in Mainly rubber plantations, agriculture, working through contract farming arrangements with local farmers (Dwyer 2011, Diana 2008).

[20]It is unknown whether Tonglu-Jinggu is the same company as the Jinggu Border Trade Cooperation Company mentioned by Diana (2008). The latter has been granted corn import quotas to China by the Laotian government (Diana 2008). Since its further activities are unknown, and because of potential overlap with Jinggu Border Trade, it is not separately mentioned in the table.

[21]Since the sources may refer to the same potential investment/investor we have coupled these two.