

Synergies and competition between the agroindustrial sector and small-scale farmers in Angola



Study of the Round Table of German NGOs working on Angola

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April 2019



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Photograph on the title page:

Tractors imported by the project “Terra de Futuro”, Cariango, Quibala Municipality, Kuanza-Sul Province (Rainer Tump)

ABBREVIATIONS

ACM	Associação Cristã da Mocidade
ADRA	Acção Angolana para Desenvolvimento Rural e Ambiente
AJPD	Associação Justiça Paz e Democracia
ANIP	Agência Nacional do Investimento Privado
ANIP	National Private Investment Agency
BftW	Bread for the World (German Development Organization)
ECP	Poverty Reduction Strategy
GDP	Gross Domestic Product
GNP	Gross National Product
ha	Hectare
IECA	Igreja Evangélica Congregacional em Angola
KZ	Kwanza
LWF	Lutheran World Federation
Mbakita	Missão de Beneficência Agropecuária do Kubango, Inclusão, Tecnologias e Ambiente
NGO	Non-Governmental Organization
SDG	Sustainable Development Goals
UNDP	United Nations Development Program of the United Nations
SODEPAC	Sociedade de Desenvolvimento do Polo Agroindustrial de Capanda, S.A.
ToR	Terms of Reference
UDHR	Universal Declaration on Human Rights
UTIP	Unidade Técnica de Investimento Privado

“The former vice-governor gave us a bag of rice, a bag of salt and some blankets to let his cattle graze in our area. Then he sold our area and today the new owner occupies an area of thousands of hectares. We lost our farm areas, live in the area of another traditional leader and cannot not even visit the sacred places of our ancestors”

The traditional leader of a village in Kuanza-Sul province that has been removed because of the (illegal) occupation by an Angolan businessman on November 11, 2018

0. Executive Summary

Objectives of the study

The main objective of this study is to reflect the impacts of agricultural and forestry Mega-Investments on the rural population and the Angolan economy. The special interest of the research was the degree to which synergies were achieved between the private agricultural sector and small-scale farmers.

With this study, the Round Table of German NGOs wants to contribute to the discussion on the phenomenon of land grabbing in Angola and show alternatives of an integrated rural development that considers both the interests of the rural population and the government's intention to diversify the Angolan economy.

The study process and methods used

The results of this study are based on two separate steps. In early 2018, a desk-study was conducted on the size of agricultural and forestry mega-investments in Angola. The main result was the identification of 48 mega-investments across the country (see Annex 2). In November 2018, the second phase of the study followed with the visit of 14 mega-investments in Malanje, Kuanza-Sul and Kuando Kubango provinces, combined with numerous meetings with investors, farm managers, the neighbouring population, state representatives and NGOs in these three provinces.

The preliminary results of the study were presented on 23rd November 2018 at the NGO Mosaiko in Viana.

The study used a mixture of quantitative and qualitative methods. To obtain data on the size and economic viability of mega projects, mainly quantitative methods were used. For the interviews on synergies and competition between the agricultural sectors a guideline with open questions was used. Whenever possible, the information received was triangulated with other sources.

Main results of the study

The study shows that the state's strategy of giving impetus to the Angolan economy through the support of agricultural and forestry mega-investments has failed completely. Of the land allocated for 48 mega-investments from 2015 to 2018 in a total size of 1.1 million hectares, only an area of 80,000 hectares has been used productively, which makes up 7% of the area granted.

Comparing the area required (and sometimes taken from rural populations with no legal basis) of 2.4 million hectares, the 80,000 hectares of effective use only make up 3.3%. This means that 96.7% of the required land remained unused for rural production and food security in Angola.

The graph below illustrates the large discrepancy between the planned, required and productive area.

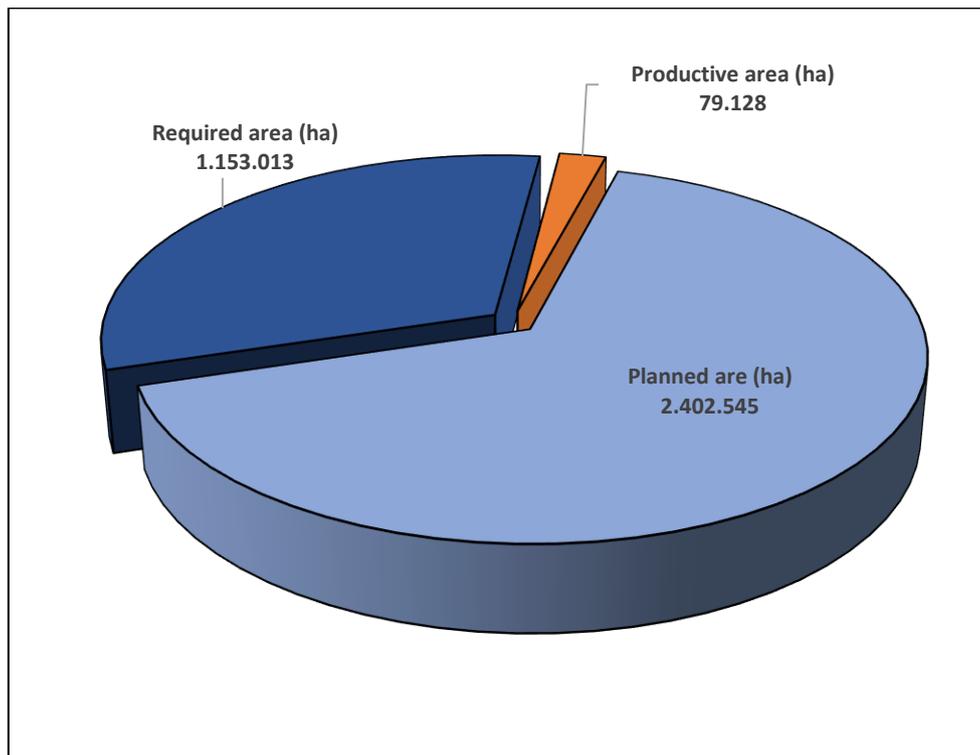


Figure 1: Illustration of the difference between the planned, required and productive area

Source: Internet research including landmatrix.org, farmlandgrab.org and Government of Angola sites.

Some of the mega-investments were declared "development projects" even when only following private interests. In this way it was possible to receive more than one billion Euro of public funds from the governments of Angola, China, Brazil and others. More Angolan public funds were injected through the Angolan Agrarian Development Fund and the Development Bank of Angola. As 9 of the 14 (64%) mega-projects have gone bankrupt or have serious financial problems, most of these public funds can be considered lost.

Interviews with the neighbouring communities of the mega-projects showed that in none of the 14 cases visited the land law was complied. Real community consultations were not carried in none of the 14 cases and no fair compensation was paid to the population who lost their lands.

The reasons for the failure of most mega-investments are diverse. In 8 of the 14 mega-projects visited (57%) the investor was a (former) military or an Angolan person connected to the government. These projects worked while the investors were in a high position in the province or municipality. As soon as the investor moved out of this position, investments began to fail.

At least 5 of the investments visited (36%) were never economically viable. These projects were apparently designed to achieve high credits (the highest of USD 360 million) and were never serious about implementation. Another important reason for failure was that the size of most agricultural mega projects simply exceeded the technical and financial capacity of investors.

The study shows the great potential for synergies between the private and the family agricultural sectors. Examples found in the field are the transfer of agricultural know-how

and training, the construction of social infrastructure by the investor, the sale of agricultural inputs and cooperation in the marketing of agricultural products. Unfortunately, this potential for synergies is being underutilized due to lack of trust and lack of investor interest in peaceful coexistence with the neighbouring population.

Main recommendations

Based on the findings of the study, the consultants made a number of recommendations for different actors. The main recommendations are:

General recommendations

- ▶ The potential for synergies between the private and family sectors should be better exploited. Areas of cooperation should already be explored and defined during the land negotiation process.

Recommendations for investors

- ▶ Combine the knowledge of young graduates from agronomy faculties with the practical experience of young people from rural villages.
- ▶ Invest in decent wages to prevent workers from leaving.
- ▶ Make better use of synergies with the family farming sector, especially in the areas of seed production and distribution, improved farming practices and marketing of agricultural products.

Recommendations for the Angolan government

- ▶ It is necessary to put an end to the practice of ignoring the norms of the Angolan land law when handing over large-scale land to private or public companies on the grounds of "public interest". The "theft" of agricultural land from communities should never be justified by the public interest because it puts the interests of investors above those of rural communities.
- ▶ Conduct real community consultations whenever the rights and interests of rural communities are affected.
- ▶ Each concession process for large agricultural and forest areas should be reviewed over the next two years. In cases where the review shows that the land has been illegally occupied or that the investor only uses a small part of the land in a useful and effective way, the land (or at least part of it) must be returned to the rural communities.
- ▶ Where rural communities lose all or part of their land, they should receive fair compensation; the process of defining compensation should be transparent.

Recommendations for the Angolan civil society

- ▶ It is necessary to join forces between national NGOs and international partners to defend the rights of the rural population against investors who do not respect these rights.
- ▶ Continue the effort to support producer associations, mainly in the thematic areas of institutional support, financial management, small irrigation systems and marketing of agricultural products.

1. Study Description

1.1 Objectives of the Study

The objectives of this study are defined in the terms of reference:

1. *Verify and update the results of the pre-study "Dimension of agricultural and forestry mega-investments in Angola".*
2. *Investigate how the process of allocating land to the investor was carried out? Were there consultations with the affected communities? Have Angolan laws been complied with?*
3. *Check whether there have been cases in which families or communities have lost their land or homes? Did the investor pay compensation? Were the indemnities fair?*
4. *Investigate whether the investor has brought positive impacts (e.g. employment, training in agricultural techniques)?*
5. *Reflect strategies for the defence of the rights of rural communities together with partners from Bread-for-the-World and MISEREOR. These strategies may also include proposals for better cooperation and synergies between the private sector and the family sector.*
6. *Provide data and recommendations for the planned seminar on land and food security in Luanda in the second quarter of 2019.*

As part of the study carried out in October and November 2018, it was possible to achieve all six defined objectives.

1.2 Presentation of the work performed

This report presents the conclusions of the fieldwork of the "Study on synergies and competition between the private and family agricultural sectors in Angola". This is an initiative of the Round Table of German NGOs working in Angola and is a follow-up to the desk-study on the same topic done through literary review, data received from Angolan NGOs, investors and information available on the Internet. The research was entrusted to the international consultant Rainer Tump who was assisted by Ernesto Cassinda, Director of ACM Kuanza-Sul.

The field research took place over three weeks, specifically from 5 November to 23 November. It began with an initial socialization meeting of the Terms of Reference and presentation of the results of the above-mentioned desk-study at the MOSAIKO centre in Luanda. This was followed by field work itself, with the team of consultants visiting the Municipalities of Malanje, Cacusso, Quibala, Cela (Waku Kungo), Kuito Kuanavale and Cuchi, of the Provinces of Malanje, Kuanza-Sul and Kuando Kubango respectively.

The preliminary results were presented in Luanda, on 23 November in Mosaiko, and were attended by 14 people from various organizations, and the participants made

contributions and noted the preliminary findings, to which the consultants are very grateful.

The report is organized in 6 chapters, in addition to the executive summary. Chapter 1 provides a brief description of the study, objectives, the process and methodologies used. Chapter 2 presents the profiles of the mega projects visited, looking above all at technical and economic feasibility. Based on the findings of the visits, chapter 3 provides an analysis of the impacts of the mega-projects on the economy in general, the local population, food security and the environment of Angola.

Chapter 4 deals with competition between the private and family sectors and Chapter 5 on synergies between them. Finally, chapter 6 covers the conclusions that are followed by general and specific recommendations for the Government of Angola, investors and civil society.

The conclusions and reflections contained in this document are only the results of the study and are also intended to contribute to the debate on this issue, which is closely linked to secure land tenure in Angola - fundamental for combating hunger and poverty, particularly for rural communities that depend on land for their food and for suppressing other vital needs.

Study limitations

The consultants have invested a lot of time in identifying the most recent mega-projects in Angola. After a first bibliographic and internet study the preliminary results were sent to various experts in the field and to Angolan NGOs active in the respective provinces. Unfortunately, only 7 of the 19 people and institutions responded, with the consequence that it was not possible to confirm the information in 5 of the 11 provinces with recent mega-projects.

Of the 14 mega-projects selected to be visited, only 8 (57%) could be visited without limitations. The visit of two mega-projects in Kuanza-Sul (14%) was refused. A partial visit was possible in 4 mega-projects (29%).

1.3 Methods used

The study used a mixture of quantitative and qualitative methods. To obtain data on the size and economic viability of mega-projects, mainly quantitative methods were used. A script with open-ended questions was used for the interviews on synergies and competition between agricultural sectors. At each meeting the researchers focused on the most important aspects for the specific case study.

In summary, the data and conclusions of this study are based on the application of the following methods:

- The desk-study on the size of mega projects is based on internet research (reports from the Government of Angola, grain.org, farmlandgrab.org, landmatrix.org,

newspapers and others) and data received from Angolan NGOs as well as from investors.

- In the provinces of Malanje, Kuanza-Sul and Kuando Kubango interviews were conducted with government representatives and local authorities at provincial, municipal and local levels.
- It was possible to conduct interviews with investors and workers in 9 of the 14 mega-projects visited.
- In the three mentioned provinces, meetings were held with communities affected by the mega-projects.
- Meetings were also held with different NGOs in the three provinces.
- An initial workshop was held on 5th November 2018 to reflect the terms of reference and methods of the study with NGOs in Luanda.
- A final workshop was held on 23 November to present and reflect the preliminary results of the study.

As this study deals with sensitive data (company debts, banks that did not analyse the risks well, corruption, conflicts over land, etc.), the consultants guaranteed to anonymise all the information received. Consequently, the study mentions the names of the interviewees, the location of the companies and the communities contacted only in exceptional cases.

2. Profile of the Mega-Projects visited in the scope of the study

This chapter analyses the profile of the mega-projects visited in November 2018. A total of 14 mega-projects were visited in the provinces of Malanje, Kuanza-Sul and Kuando Kubango. Table 1 gives a summary of the profile of these projects:

Province	Municipalities	Number of mega projects visited	Total planned area of mega projects visited by province	Agricultural projects	Forestry projects	Angolan investment	Angolan and foreign cooperation
Malanje	Cacusso and Cangandala	4	166.000	4	0	2	2
Kwanza-South	Quibala and Cell	6	122.000	6	0	4	2
Kuando Kubango	Cuchi and Kuito Kuanavale	4	282.000	2	2	1	3
Total		14	570.000	12	2	7	7

Table 1: General profile of the mega-projects visited in the context of the study

Source: Visit of 14 mega-projects in the provinces of Malanje, Kuanza-South and Kuando Kubango.

2.1 Criteria for choosing provinces and *mega-projects*

In order to analyse a choice of the 48 mega-projects identified during the desk study more thoroughly, it was first necessary to choose three provinces that could be visited by the team of consultants for three weeks.

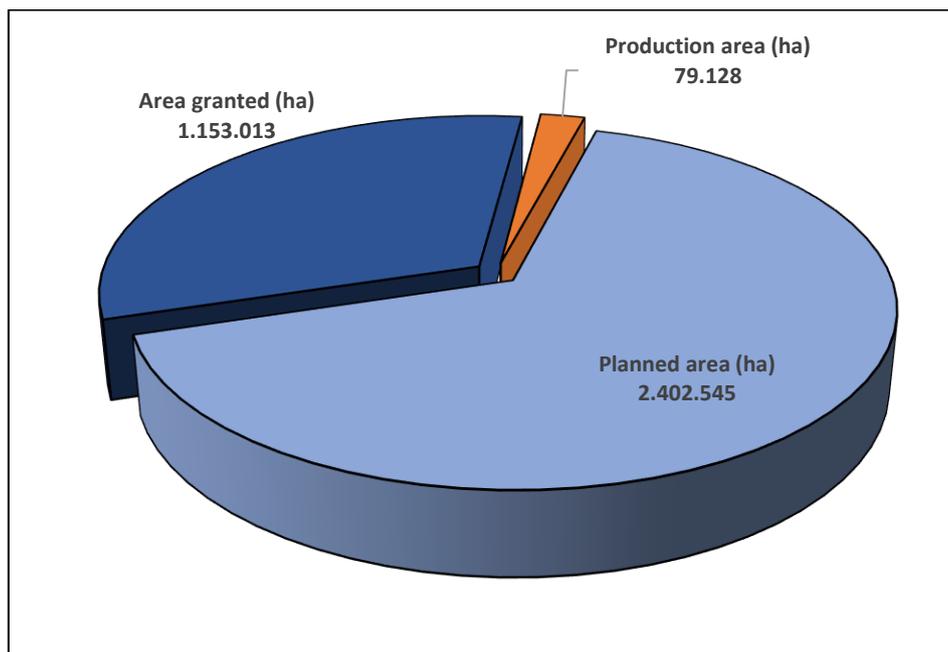
It was decided to choose the three provinces of Angola with the largest area planned by investors. Table 2 shows the summary of mega-projects by province. The provinces with the largest planned area are 1. Malanje, 2. Kuanza-Sul and 3. Kuando Kubango.

Province	Number of mega-investments	Planned area (ha)	Area granted (ha)	Production area (ha)
Bengo	4	132.000	97.000	7.628
Cunene	3	147.000	42.000	0
Huambo	1	30.000	30.000	0
Huíla	8	102.513	99.013	33.740
Kuando Kubango	4	284.000	27.000	0
Kuanza North	1	13.000	13.000	0
Kuanza Sul	15	486.632	270.000	12.260
Luanda	1	100.000	100.000	5.000
Malanje	5	417.000	417.000	16.000
Moxico	1	22.400	0	0
Uíge	1	25.000	25.000	0
Several provinces	4	643.000	33.000	4.500
TOTAL	48	2.402.545	1.153.013	79.128

Table 2: Size of mega-projects by province

Source: Internet research including landmatrix.org, farmlandgrab.org and Government of Angola pages.

The graph below illustrates the large discrepancy between the planned, requested and productive area.



Graph 1: Illustration of the difference between the planned, requested and productive area

Source: Internet research including landmatrix.org, farmlandgrab.org and Government of Angola pages.

As a second step in selecting the mega-projects to be visited, a total of 15 of the 23 investments registered in these three provinces had to be chosen. The two municipalities in each province with the largest number of mega-projects were chosen. Table 3 shows the selected municipalities and the number of mega projects visited:

Province	Municipality	Number of mega projects visited	Total planned area of mega projects visited by province
Malanje	Cacusso	3	140.000
	Cangandala	1	26.000
Kwanza-South	Quibala	5	108.500
	Cell	1	18.000
Kuando Kubango	Cuchi	2	270.000
	Kuito Kuanavale	2	12.000
Total		14	574.500

Table 3: Mega-projects visited as part of the study

Source: Visit of 14 mega-projects in the provinces of Malanje, Kwanza-South and Kuando Kubango

The 14 mega-projects visited make up about one third of all the mega-projects identified. The total area of these 14 projects corresponds to about 20% of the total area of all 48 identified projects (see Annex 4).

2.2 Profile and technical and economic feasibility of Mega-Projects

In order to assess the impacts of agricultural and forestry mega-projects, it was necessary to assess their technical and economic feasibility. An investment that is not viable will not be sustainable and consequently will not have positive long-term impacts. On the other hand, a viable investment can create jobs and have positive impacts on the local economy in the long term.

The consultants did not have access to internal project documents or documents of the banks that provided credits. It was then necessary to base the assessment of technical and economic feasibility on public documents, mainly presentations by companies on the internet, articles in newspapers and official pages such as the Technical Unit for Private Investment (UTIP) or the National Agency for Private Investment (ANIP).

In 6 of the 14 cases investigated (43%) the evaluation was easy: either the mega-investments had already failed (4 cases; 29% of the mega-projects visited) or had never even started production (2 cases; 14% of the mega-projects visited).

Of the 14 investments analysed, 3 other mega projects (21%) face serious financial problems and their future is insecure. In all three cases, the credit granted was mainly

used to invest large sums of money in a huge infrastructure, so there was not enough money to support the operating costs. The situation is aggravated by a lack of foreign exchange, which makes it difficult or impossible to import parts for the machines or to maintain skilled labour from abroad.

In 3 of the 14 investments analysed (21%) a certain level of production was maintained and running costs covered, but on a much smaller scale than planned. On average, these projects are producing 14.7% of the planned area and 16.2% of the requested area.

Only 2 of the 14 investments analysed (14%) achieve a satisfactory production and make a profit. The main factors of success of these investments are:

- At least some of the investors are agricultural experts: problems can be solved on the spot without having to wait for higher orders from Luanda or abroad;
- In addition to bank loans, investors have equity capital, which allows them to withstand delays and other difficulties that almost always occur in agricultural projects;
- Investors have access to foreign exchange, which allows the import of parts and payment of skilled labour from abroad;
- Both companies have their own stores in Angola and export part of their product abroad.

Table 4 shows a summary of the feasibility of the mega projects analysed and their main problems:

Situation of mega-projects in November 2018	Failed	With serious economic problems	Producing, but on small areas, little profit	Good production, makes a profit
Number of mega-projects per category	6	3	3	2

Table 4: Summary of the feasibility of the mega-projects analysed

Source: Visit of 14 mega-projects in the provinces of Malanje, Kuanza-South and Kuando Kubango.

The technical and economic feasibility analysis of 14 mega projects visited in Malanje, Kuanza-Sul and Kuando Kubango provinces shows that only 2 (14%) are successfully operated and have good chances of survival. Six mega-projects (43%) are currently struggling with serious problems. It is likely that at least four of these will not survive for more than a year. Six megaprojects (43%) have already failed. Even if it is possible to find buyers for these projects, the banks that have lent credits will lose most of their money.

Analysing the reasons for the failure of most mega-projects, the study showed the following results:

- In 8 of the 14 mega-projects visited (57%) we find the model "Governor", "Municipal Administrator" or "General". This means that these investments were initiated by influential persons in government or the armed forces at the municipal, provincial or national level, often using public funds. These projects worked while the investor was in a high position in the province or municipality. The moment these people left the position, investments began to fail.
- At least 5 of the investments visited (36%) were never economically viable. These projects were apparently designed to achieve high credits (the highest of USD 360 million) and were never serious about implementation.
- The size of most agricultural mega-projects exceeds the technical and financial capacity of investors. This phenomenon was found in 9 of the 14 mega-projects visited (64%). One of the reasons is bank staff commissions (the higher the credit, the higher the commission). On the part of the banks, a serious analysis of the technical and economic viability of the projects prior to the granting of credits and an effective monitoring during the implementation phase of the mega-projects were lacking.

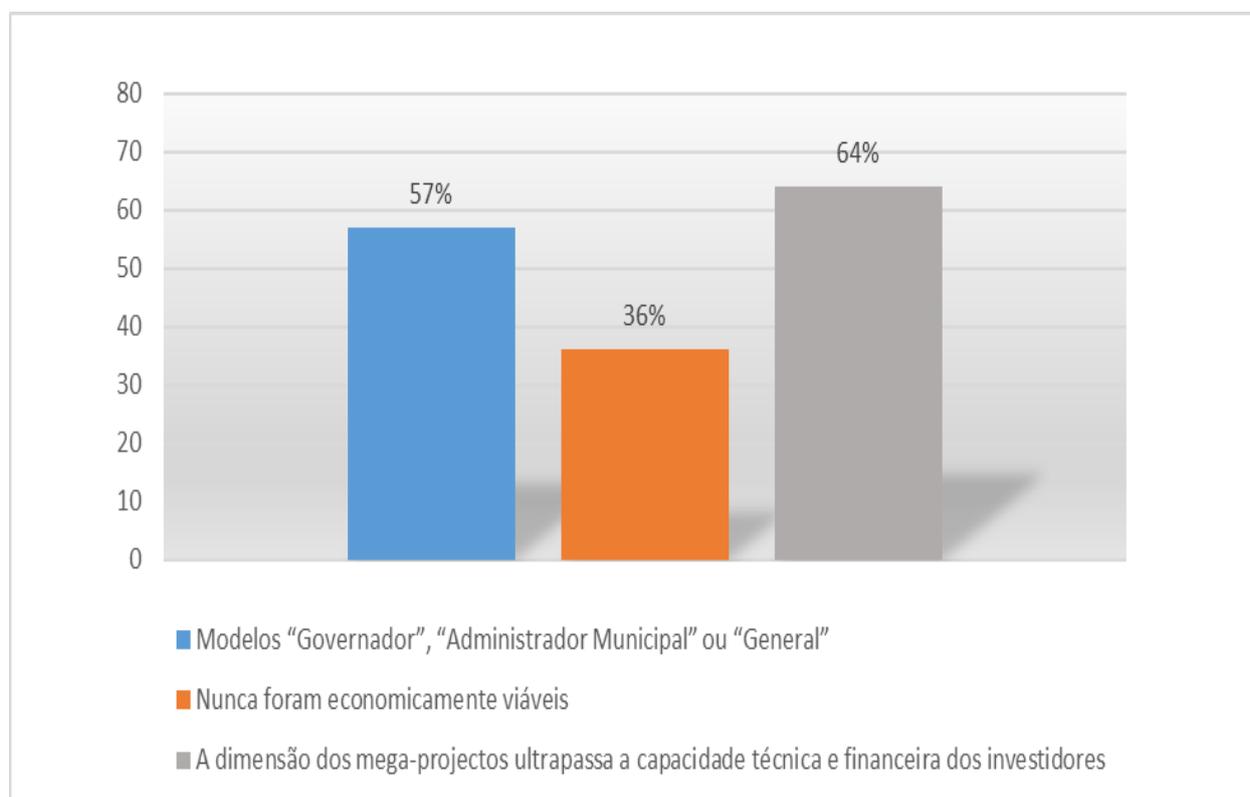


Chart 2: Main reasons failure of mega-investments¹

Source: Visit of 14 mega-projects in the provinces of Malanje, Kuanza-South and Kuando Kubango.

¹ The percentage is above 100% because multiple answers were possible

3. Impacts of agricultural mega projects on the economy and food security

3.1 Impacts of agricultural mega-projects on the Angolan economy

One of the arguments for the Angolan government to attract large agricultural investments is the need to diversify the Angolan economy. In principle this argument is valid, since it is not healthy for any economy to depend on more than 90% on extractive industries.

The agricultural and forestry sectors together contribute only less than 10% of Angola's² Gross Domestic Product (GDP) for two main reasons:

1. In the agricultural sector family farming dominates, which is mainly oriented towards consumption and sales in the surrounding informal markets. Neither consumption nor sales in the informal sector are included in the GDP statistics, although both are extremely important for the Angolan economy and for combating poverty.

In other words: family farming already makes a very important contribution to the diversification of the Angolan economy, but this fact is not shown in either the GDP or other government statistics.

2. The forestry sector is currently dominated by companies from China and Vietnam, which cut trees without a license (but with the knowledge of influential people at municipal, provincial and national levels) and transport the timber overnight to the ports of Namibe, Lobito and Luanda.³ Due to the illegality of most of these exports, the revenue is not included in any national statistics and is therefore not included in GNP.

Currently only two of the 14 companies visited have a visible impact on the growth and diversification of the Angolan economy. But it appears that these two companies still do not pay considerable taxes due to the investment conditions negotiated with the Angolan government.

In total, the 14 mega-projects visited created around 2,200 jobs, of which around 1,300 are permanent jobs. While leaders and some qualified agronomists earn well, the vast majority of hired personnel earn around the minimum wage or even less. More than 80% of the workers interviewed earned between 12,000 and 16,000 Kwanza per month. A lot of them leave the house at 5:00 in the morning and don't come back until 6:00 or 7:00. They earn only 640 Kwanzas a day for hard work on farms, which is not enough to feed a family.

Despite the large investments, there is hardly any agricultural production, few taxes, little employment and extremely low wages.

² [https://www.indexmundi.com/pt/angola/produto_interno_bruto_\(pib\).html](https://www.indexmundi.com/pt/angola/produto_interno_bruto_(pib).html)

³ http://www.angop.ao/angola/pt_pt/noticias/ambiente/2017/5/23/Abate-ilegal-arvores-causa-prejuizos-aos-cofres-Estado,9ab0f136-8b2b-4615-bc03-1cc04987ddc1.html

One of the negative impacts of mega projects is the fact that Angolan banks (private and state owned) lose millions of dollars in credits that are not returned. In three cases there was also the involvement of foreign banks. It is estimated that the banks have lost (or will lose) a sum of about 1,400 million USD - only in the 14 mega-projects visited in this study. Part of this sum contributes to Angola's external debt.

As shown in Table 2 "*Size of mega-projects by province*" above, the 14 mega-projects visited only use about 79,000 hectares productively. This makes up 6.9% of the granted area of 1,153,000 hectares and only 3.3% of the required (and, in most cases, occupied) area of 2,402,000 hectares. It means that some 2 million hectares of arable land are lost to rural communities in favour of large 'ghost' projects, most of which have been financed with public funds.

3.2 Impacts of agricultural mega projects on the local rural economy

In all the mega-projects visited, the researchers sought to know the impacts of the agricultural mega-projects on the rural population, such as job creation, training in agricultural techniques and the construction of social infrastructure. In order to have reliable data, the local population as well as farm managers and workers were interviewed.

Table 5 gives a summary of the responses received:

Impact type	High	Medium	Low	Zero
Number of created jobs	1	2	7	4
Wages	0	2	8	4
Training for workers	0	2	8	4
Social infrastructures	0	2	2	10
Seeds and agricultural instruments	0	0	2	12
Land tillage	0	0	1	13
Support at harvest (allow the population to collect harvest residues)	0	1	0	13
Marketing support	0	1	0	13

Table 5: Summary of the impacts of the mega projects visited

Source: Visit of 14 mega-projects in the provinces of Malanje, Kuanza-South and Kuando Kubango.

Only one of the fourteen mega-projects created a considerable number of jobs. Four mega-projects didn't create any jobs because they never started.

In terms of wages, it dominates a very low wage around 13,000 kwanza (about 37 Euros) per month. Only two mega-projects (14%) pay over 18,000 kwanza (about 50 Euros) for field workers.

Two farms have shown that it is worth investing in the training of local young people. An impressive example is the "Terro do Futuro" farm where local youth run entire animal feed factories. Unfortunately, a vast majority of mega-projects (86%) did not invest at all or very little in the training of their workers.

Four mega-projects (28%) fulfilled their commitment to local communities by building social infrastructure. In this context, two health posts were built, a day-care centre, three schools and two water supply cisterns. The lack of cooperation between investors and the Ministries of Health and Education meant that only one of the health posts and one school were functional during the visit in November 2018. In the other health post built and in the two schools there was a lack of staffing by the state.

In two cases visited (14%), the distribution and sale at symbolic prices of seeds and agricultural instruments contributes to a good relationship between the mega-projects and the local population.

Only one farm in the Kuanza-Sul province supports the population by allowing the collection of remains from the maize harvest. This example was very positively evaluated by the communities. On the contrary, the neighbouring farm burns corn stubbles in large quantities. This practice, called "food graveyard", was one of the reasons for the poor relationship between the farm and the local population.

Only one farm used the means of transport to support the local population in selling its products.

In short, it should be noted that most mega-projects contribute little or nothing to the rural economy. On the other hand, the few positive examples show the great potential that better cooperation between mega-projects and the family sector could have.

3.3 Impacts of agricultural mega projects on food security in Angola

Only 4 of the 15 farms visited (27%) contribute to food security.

73% contribute almost nothing to food security because

- On average they produce only on 3.3% of the occupied area. This means that 97.7% of the occupied area are currently not being exploited for agricultural production and consequently lack to achieve a higher level of food security.
- They mainly plant products such as ethanol or crops for export.
- They are stopped because of lack of liquidity or misuse of funds.

Around US\$2.5 billion in public funds (Angola, China, Brazil and other countries) resulted in a contribution of less than 2% of the agro-industrial sector to food security in Angola. Given that a large part of the area now occupied by agro-industrial complexes has been lost to food production by the family sector, the balance of mega-projects for food security is even negative.

3.4 Environmental impacts of agricultural and forestry mega-projects

In 9 of the 14 mega-projects visited (64%), felling of large areas with native trees was observed without making adequate use of the land. In the municipality of Cuchi there was a plan to cut down native forests in a total area of 250,000 hectares. The plan was to burn the trees to produce steel. The "cleaned" area was destined for eucalyptus monocultures and cattle. The disastrous consequences of these plantations are known in other southern African countries, such as Mozambique and South Africa. Fortunately, the Brazilian project never got off the ground. But the risk that other investors will resume the initiative remains.

Three of the mega projects visited (21%) use excessive chemical fertilizers and pesticides, which has negative impacts on the water quality of the neighbouring population.

4. Competition between the private and family farming sectors

Although in large parts of Angola access to land by peasant families is still not very problematic, there is a fear among Angolan land experts (ISA 2012:3) that land conflicts may increase, considering the demand for land by the business sector. In fact, the National Policy for the Granting of Land Rights (Presidential Decree 216/11) recognizes this fact, when referring that "the majority of the population does not have security of access and use of land" and that the "systems of titling, cadastre and registration of land [are] deficient".

In the provinces visited, most peasants say they have enough land to cultivate - except in Kuanza-Sul, where there are cases where the population says they no longer have enough land to cultivate. In this Province, a private project occupied two villages in their entirety, forcing the people to settle in a neighbouring village where they live with many limitations because they feel like they are on other people's land. Still in Kuanza-South, two weeks before the researchers arrived, the people of three villages complained of a farm that was usurping their land of about 12,000 ha. This incident resulted in the burning of the National Police car that moved to those locations. Similar incidents also occurred in Malange, although not very visible, where SODEPAC forces the population to leave their habitat for areas that are 15 or more kilometres away from the original villages.

Case of Fazenda Santo António, Kuanza-Sul - An example that happens in several locations

A local businessman asked the population for land. After a while, he sold the land to another businessman who ended up with 6,000 ha. Some villages ended up being inserted within the limits of the farm and claim that they were unaware of the business between the first and second businessman. In 2012, a court ruled that the land should be returned to the people, but until October 2018, nothing happened. In November 2018, some people from Luanda invaded the farm, published photos on social networks, denouncing this case and promising to fight in defence of their lands until the last consequences. Unconfirmed information indicates that the landowner occupying the area is acquiring more land in the same Municipality, in order to expand his agglomerate.

SODEPAC, Malanje

A Government initiative that planned to exploit 410,000 ha in 3 Municipalities, with 186 villages and a population of about 70,000. The project focuses on

- in the cultivation of various grains,
- in the rearing of chickens and beef cattle,
- in logging,
- in the planting of sugar cane and cassava,
- in the production of vegetables and fruit.

In addition, the project also covers education, health, transport, housing, family farming and the production chain.

The populations of the villages that lived in the area demarcated by SODEPAC were relocated from their areas to others that are between 3 and 15 kilometres from their original habitat. In some cases, there has been compensation, but there are reports of various conflicts. Fortunately or unfortunately, this project was paralysed by a government decision, mainly because in 10 years it had failed to effectively occupy more than 25% of the total area of the agro-industrial cluster.

4.1 The process of land acquisition by mega-projects

The fact that the business sector occupies large plots of land can endanger the livelihoods of future generations and the increase in land conflicts could harm both investors and peasant families.

In this chapter we present the strategies used in land acquisition for mega-projects, whether for public or private purposes, competition and land conflicts, and conclude by analysing the extent to which human rights are being violated by the state or by investors.

In basic terms, the land acquisition process always involves two parts. On the one hand, the interested party and, on the other hand, the party that will give up the land. Angola's Land Law (Law 9/04) states in its Article 5 that "Land is property originally owned by the State and integrated into its private or public domain".

In most of the cases visited it was found that it was the state that ceded the land to the mega-projects aimed at promoting agro-industrial production in the country. Some of these projects such as SODEPAC, Gesterra and several other farms have been created by the state using public funds obtained through international loans or Angolan banks. In the case of SODEPAC, whose dissolution was decided by Presidential Order no. 155/18

of 13 November 2018, it acted as an investment promotion agency and aimed at facilitating the entire process of land acquisition, dispensing with the need for the investor to spend time and money on "normal" bureaucratic processes to obtain the land title.

There are also situations in which the state can cede land to the governments of other countries, such as the case of 7,500 ha that the Angolan Government has promised to cede to the Cape Verdean Government, although it seems that the intention has not been achieved until at least the end of 2018.

The research found that there were large land acquisitions for private projects whose transfer seems not to have obeyed the legally established rules. Some investors used intermediaries and paid money to corrupt village leaders and perhaps even high-ranking state officials to issue favourable opinions and consequently obtain concession bonds. It was not by chance that some large project managers did not agree to cede information to researchers. In the specific case, a mega project visited did not allow the team to visit its locality, apparently because it already has open conflicts with local communities and the managers feared that they would be exposed to the public through this research.

As shown in table 6, most of the projects visited were planned by the state and investors without real community consultations. Most of the interviewed families reported not having been consulted properly about the planned investments. Others said that they gave only a part of their community land, but "the investor ended up enlarging the area without warning" - meaning that some investors deceived the communities about the actual size they wanted. It was also mentioned by the communities that investors failed to fulfil promises.

Question Answers (N=14)		Percentage
1.	Imposition without any consultation	11 79%
2.	Negotiation with soba without community involvement	01 7%
3.	Use of Influential Intermediaries	02 14%
4.	Consultations with the community with false promises	03 21%
5.	Community deception about the size of the land	12 86%
6.	Real community consultations	00 0%
7.	Violation of parts of the Angolan Land Law	14 100%

Table 6: How did the land acquisition/delivery process go?

Source: Visit of 14 mega-projects in the provinces of Malanje, Kuanza-South and Kuando Kubango.

Depending on the size of the land parcel desired, the following steps should normally be taken to obtain land for agricultural purposes (Governo de Angola: 2011):

1. Application of the interested party to the competent authority (Municipal Administrator, or Governor, depending on the size required...)
2. Consult the local population through the soba, submitting the application for use and exploitation, so that they confirm in writing that the land is vacant and not occupied, nor covered by the limit of community land.
3. Declaration of the soba of the area, attesting its agreement with the process and the absence of impediments to the concession of the land.
4. Declaration by the municipal administration of the area where the community is located, certifying that there is no impediment to the issuance of the title.
5. Provisional Demarcation
6. To allow that the whole population is aware of the process, the competent authority will publish a notice, explaining the delimitation, so that, if anyone has something to say, they can do so within 30 days. This notice is fixed in the municipal administrations and published on the radio.
7. Definitive demarcation
8. Declaration by the Provincial Directorate of Agriculture of the Province where the delimited area is located, certifying that there is no impediment to the issue of the title.
9. After 30 days, it will be possible to issue the title. Depending on the size of the delimited area, the title will be issued by order of the Provincial Government (land with an area equal to or less than 1000 hectares), the entity that oversees the registry (land with an area between 1,001 and 10,000 hectares) or the Council of Ministers (land with an area greater than 10,000 hectares).

There are reports of the existence of large Angolan landowners, mainly among governors, generals, ministers and others who own more than 10,000 ha each. Others go further, but do not make effective use of this land either. In order to obtain so much land, they use schemes in which the father, mother, children and other close relatives each require extensions of less than 1,000 ha. However, when combined, it can reach more than 10,000 or even 25,000 ha. The reason for each family member to make a separate request is simple: it is to avoid that the issuance of the title goes to the Council of Ministers that decides on concessions above 1,000 ha. This is how many of Angola's elite occupy thousands of hectares to the detriment of local populations.

As has been said, unfortunately the majority of mega-investments did not follow what is legally established, that is, they got titles possibly involving some kind of corruption. It is no coincidence that there is currently a considerable increase in land conflicts throughout the country, especially in the three provinces visited.

4.2 Competition on land between the private and family farming sectors

Since Angola felt the effects of the economic crisis, among others caused by the fall in the price of oil in the international market, the government decided to diversify the economy, and one of the priority areas was to invest more in large-scale agriculture, through obtaining credits and also attracting foreign investment to the agricultural, agroforestry or mineral sector. For all these projects to be effective, land is required on a large scale, which demonstrates that the demand for land by potential investors has increased considerably, as illustrated in table 2.

Competition over land is not only competition between wealthy Angolans with influence and the majority of the population, but also competition between Angolans and foreign capital. As shown in Table 7, about 1.4 million hectares of the 2.4 million hectares required for mega-projects since 2015 are foreign investments. In the case of the two largest foreign investors, Brazil and China, there is interest in producing mainly for export and there is little connection with Angolan companies.

Country of origin	Number of investments	Planned area (ha)		Licensed area (ha)	Production area (ha)
Angola	25	949.532		622.500	51.988
Brazil	6	609.500		364.500	25.000
China	5	642.513		12.513	440
Portugal	3	73.000		28.000	0
United Kingdom	2	35.000		35.000	1.200
Other countries ⁴	7	93.000		90.500	500
TOTAL	48	2.402.545		1.153.013	79.128

Table 7: Summary of mega-investments by origin of investors

Source: Internet research including landmatrix.org, farmlandgrab.org and Government of Angola pages

Investors from Portugal and the United Kingdom together only occupy an area of 108,000 hectares (2% of the total area required), while investments of Brazilian and Chinese origin make up more than 1.2 million, 50% of the total planned mega-projects.

Currently it is estimated that only about 2% of rural populations have land titles. About 98% of titled land is in the private sector. Thus, we can consider that a vast majority of land in Angola was granted to private individuals since rural communities do not have formal recognition of their community lands through legal documents and because the concession process is too complicated and expensive for poor families (Pacheco: 2013).

⁴ Other countries with foreign investors, one case per country: Cape Verde, Japan, Netherlands, South Korea, United States, Germany

Data collected under this survey indicate that in the last four years alone, the business sector in Angola has required around 2.4 million hectares. This is a larger leased area than the province of Luanda and in 2017 the speed of concessions had accelerated. A continuation of this policy would threaten land tenure for rural communities across the country.

Although by law the state respects the land rights of rural communities through the recognition of customary land use, community land titling is not yet a reality and, consequently, rural communities continue to lose their land often in the name of public projects that ultimately end up being privatised. Worse still is the fact that mega-projects have concessions for large areas of land that are not effectively used and do not even allow local populations to use at least part of the land, leaving communities in a very critical situation, as they depend on land for survival.

This "injustice" explains the growing number of visible land conflicts, as illustrated in the following table:

Question	Answers	Percentage (N =14)
Have there been land conflicts - between the public, private and family sectors?	11	79%
What is the extent of these conflicts?	More than 220 villages with about 33,000 people affected	About 65% of the population around the mega-projects...
Patents (visible in dispute or confrontation)	3	22%
Potentials (strong potential to evolve into visible conflicts)	9	64%
Latent (asleep, but may rise)	2	14%

Table 8: Existence of land conflicts and their dimensions

Source: Visit of 14 mega-projects in the provinces of Malanje, Kuanza-South and Kuando Kubango.

4.3 Violation of human rights by mega-projects or by the state

Although the right to land as such is not found in the letter of the Universal Declaration of Human Rights (UDHR), proclaimed in 1948, Article 17 of the Universal Declaration of Human Rights states that "Everyone, individually or collectively, has the right to property and no one may be arbitrarily deprived of his or her property". In turn, Angolan law says that land expropriation can only take place for public utility purposes and when fair compensation is paid.

It has already been mentioned in one of the previous points, that unfortunately many mega-projects acquire the land in violation of the most basic procedures of the Angolan Land Law and its regulations, do not consult or inform the affected communities; ignore the social, economic and environmental impacts; and do not respect democratic rules, which can ultimately be considered as violations of human rights.

The research found that in all projects there was no real consultation with the affected population. There are private projects that have occupied even villages in their entirety, depriving people of their cultural and social rights. A village is in dispute with an investor,

because the latter does not even let the people go to visit cemeteries and the area where its traditional rituals are held.

In three of the projects visited, the loss of their mines had negative impacts on the food production of the affected families, endangering their right to food.

These types of occupations under customary and positive law are illegal, but unfortunately judicial treatment rarely favours injured communities.

Table 9 gives a summary of the human rights violations in the 14 mega-projects visited.

Type of right violated	Answers
Right to information	13
Right to participation	13
Cultural and social rights	01
Right to food	03

Table 9: Human rights violations by mega projects

Source: Visit of 14 mega-projects in the provinces of Malanje, Kuanza-South and Kuando Kubango.

In meetings with representatives of municipal and provincial governments, the failure to follow the Land Law in Angola was justified by the importance that the mega-projects would have for the local economy or even for the "diversification of the Angolan economy". The results of this study clearly show that the positive impacts of mega-projects on both the local and national economy are almost nil and in no way justify the violation of land law or human rights of local populations.

5. Synergies between the private and family farming sectors

Despite the fact that today competition is increasingly dominant in relations between countries, companies, associations and others, the research assumed that mega projects, in addition to bringing foreign funds to the Angolan economy (for those projects not financed with public money from Angola), could also contribute positively to improving the living conditions of people where investments were made. To this end, the populations surrounding the mega-projects were interviewed, as well as the owners or those responsible for managing the farms. This chapter presents the results of these interviews. We group the benefits for the local population into i) job creation; ii) transfer of agricultural know-how and training; iii) construction of infrastructure; iv) sale of agricultural inputs and marketing.

5.1 Job creation

One of the great benefits that the recipient governments of investors expect is that through these projects more jobs will be created, generating wealth and thus contributing to the reduction of unemployment, rural exodus, etc. The projects visited promised to create thousands of jobs, but in fact, of the 14 projects visited, only two employ between

200-600 national workers. This can be considered as a visible contribution, but it is very little in relation to the hundreds of millions of Euros invested. Most of the other projects are currently in bankruptcy and are therefore on the verge of closure, with only security guards and a small number of administrative staff "guarding" the infrastructure to prevent acts of vandalism.

Interviewees reported that the jobs are of low quality, starting with very low paid wages, up to one worker receiving between 13,000 Kz and 18,000 (36.00 and 50.00 Euro) per month, aggravated by the fact that in some cases these meagre wages are not paid in time. As a result, some investors reported high absenteeism rates on their farms. Employees, on the other hand, say they are forced to skip work, because their salary is derisory. An important point to note is the fact that many of these jobs are temporary rather than full-time, another reason for the low quality of these types of jobs.

5.2 Training in agricultural techniques

One of the expectations of land investment in Africa is that investors contribute to local development, not only through the provision of jobs and social investments, but also through the direct involvement of local farmers and small-scale enterprises, such as cooperatives or associations, in the supply chain, market access etc.

11 of the 15 projects provided some training for local staff working directly on the farms, in several areas according to the specific tasks assigned to the worker, but support was low and sporadic. Even so, two satisfactory cases were found: That of a project that supported the communities in the creation of associations and cooperatives, to the point of placing agricultural technicians to encourage the local population to produce better. The populations visited found this support very valuable, as while the project was alive, everything worked smoothly. At present, it no longer does so because it is in financial bankruptcy. Another aspect was found in a mega-project with five factories, whose operation is in charge of young natives of the area where the project is located. The young people were trained by an expatriate and now take over the operation of the factories. It is a pity that the factories are not fully operational today because this megaproject also faces financial liquidity problems and does not produce the minimum quantities that the factories need.

5.3 Construction of social infrastructure

Within the scope of social responsibility, all projects promised to make social investments in favour of the communities living in the areas where the investments are located. There have been reports that in some cases the villages have agreed to cede the land because they have been promised construction of social infrastructure such as water systems, school, health posts and agricultural support. However, after receiving the land titles, most investors turned their backs on the communities, others fulfilled only part of the promises or sometimes left unfinished works.

The general results indicate that of the 14 mega projects, only 4 (29%) have made some investment in the area of social responsibility. In the province of Malanje, BIOCUM has built a health post, a nursery and a school, in addition to other social activities. In Kuanza-South, two schools were built, a health post and two water supply cisterns. In general terms, it can be said that most investors have not implemented the corporate social responsibility of the company in practice, and did not honour the promises made to the people. This brought in 8 of the 14 cases visited (57%) bad relations between the investor and the local population. In three cases (21%) the poor relationship and disappointment of the local population culminated in cases of investment sabotage or theft of equipment and animals.

Table 10 of a summary on the fulfilment of social responsibility:

	Number	%
Promises made to the local population	14	100
Promises fulfilled over 90%.	1	7
Promises fulfilled between 50 - 89%.	2	14
Promises fulfilled 10 - 49%.	2	14
No promises kept	9	64

Table 10: Investors' compliance with social responsibility

Source: Visit to 14 farms, interviews with farmers, company managers, workers and the local population.

5.4 Sale of agricultural inputs and marketing

A good relationship between national or foreign investors and the local population can bring synergies such as cooperation in the purchase and sale of agricultural inputs or in marketing. Examples found in Angola are the collection of manure and poultry faeces (guano) for farms and the purchase of products from local producers and the support for small-scale farmers in transporting and selling their production.

Three of the 14 investors interviewed (21%) say they are willing to buy peasants' production, provided they meet certain conditions, such as product quality and the ability to supply regularly, given that they have commitments to supply large supermarkets and export their products. However, the population interviewed said they had never been contacted for this purpose.

Of the 15 projects, only two (14%) provided support in terms of seeds and agricultural tools for the populations adjacent to the land of the investors. As far as marketing is concerned, only one megaproject (7%) was able to buy part of the production of the local peasants. The project is now facing financial problems and has stopped implementing direct support activities for farmers.

As can be seen in the table below and as mentioned in the previous points, some mega-projects have presented good intentions, as can be seen in the SODEPAC video available here (<https://www.youtube.com/watch?v=AkiiuhDkxUQ>), but the results in practice show

that the impacts are still marginal or even invisible. The following table summarizes this information.

Impact type	High	Medium	Low	Void
Number of planned versus created posts	1	2	7	4
Wages	0	2	10	2
Training for workers	0	2	8	4
Social infrastructures	0	2	2	9
Seeds and agricultural instruments	0	0	2	12
Land tillage	0	0	1	13
Harvest support	0	0	0	14
Marketing support	0	1	0	13

Table 11: Impacts on the 14 farms visited within the scope of the study

Source: Visit to 14 farms, interviews with farmers, company managers, workers and the local population.

6. Conclusions and recommendations

6.1 Conclusions

The study showed that the Angolan Land Law is rarely applied when it comes to mega-investments in agriculture or forestry. It also showed that there is great potential for synergies between the agro-industrial sector and the family sector, but that this potential is rarely used.

The study clearly shows that the vast majority of agricultural and forestry mega-investments in the past decade have not contributed to local development or economic diversification in Angola. In an interview for the Portuguese newspaper Expresso João Lourenço, since 2017 the President of Angola, was asked about the future of “megalomaniac projects” in the agricultural sector. President João Lourenço's response was very clear:

"I agree. Proof of this is that we have discontinued the strategy of the State stalling millions of dollars in the setting-up of large farms for the production of cereals and eggs, which have given absolutely no results. (...). Our focus will therefore be on family farming, without prejudice to the fact that this can coexist with entrepreneurs

who invest in large private farms and who will also receive our support. But our main concern will be to support family farming."⁵

The main reason for failure of megaprojects is the lack of sincerity on the part of investors: some have only used public funds or bank credits to occupy large areas of agricultural land without conditions and even intentions to use these areas productively. In this way, the Angolan state has lost around 2 billion Euros to support non-viable mega-projects, rather than using these funds to support the family farming sector. Support for the family farming sector with serious and well-monitored programs seems the most viable measure to develop Angola's extensive rural areas, to reduce food imports, and to diversify the national economy.

Two of the 14 mega-projects visited show the potential for better cooperation between the private agricultural sector and the family sector. These are small initiatives such as the purchase of quality seeds by a farmer and resale to local farmers, the training of young people on the farms or the support of the population at the time of harvest or the joint marketing of agricultural production, taking advantage of the farmer's transport. These small examples show that good coexistence between the two sectors is possible, can create win-win situations (where nobody loses and both sides win) and can at the same time reduce the large number of conflicts between mega-projects and the local population.

6.2 Recommendations

The recommendations in this chapter are derived from the results of the field study. In order to facilitate their analysis and application, they are classified for the different addressees:

- For investors, whether national or international
- For the Government of Angola
- For the Angolan civil society

General recommendations

- ▶ The potential for synergies between the private and family sectors should be better exploited. Areas of cooperation should already be explored and defined during the land negotiation process.
- ▶ The Ministry of Agriculture's Agricultural Extension Services should be prepared to support cooperation between the private sector and the agricultural family sector and to support mediation of conflicts between the two sectors.

⁵ https://club-k.net/index.php?option=com_contentiew=articled=33975:sao-conhecidos-os-que-trairam-a-patria-joao-lourencoatid=14:entrevistasang=pttemid=1090

Recommendations for investors

- ▶ Invest much more in the training of local young people.
- ▶ Combine the knowledge of young graduates from agronomy faculties with the practical experience of young people from local villages.
- ▶ Invest in decent wages to prevent workers from fleeing.
- ▶ Make better use of synergies with the family farming sector, especially in the areas of seed production and distribution, improved farming practices and marketing of agricultural products.

Recommendations to the Government of Angola

- ▶ It is necessary to put an end to the practice of ignoring the norms of the Land Law in order to hand over large-scale land to private or public companies on the grounds of "public interest". The "theft" of agricultural land from communities should never be justified by the public interest because it puts the interests of investors before the interests of rural communities.
- ▶ Conduct real community consultations whenever the rights and interests of rural communities are affected.
- ▶ Each concession process for large agricultural and forest areas should be reviewed over the next two years. In cases where the review shows that the land has been illegally occupied or that the investor only uses a small part of the land in a useful and effective way, the land (or at least part of it) must be returned to the rural communities.
- ▶ In cases where the review shows that the land has been illegally occupied or that the investor only uses a small part of the land ceded in a useful and effective way, the land should be returned to rural communities.
- ▶ Where rural communities lose all or part of their land, they should receive fair compensation; the process of defining compensation should be transparent.
- ▶ It is necessary to create a registry of rural areas in Angola in a transparent manner and recognizing the community areas.
- ▶ Some of the existing projects aimed at increasing the capacity of the family sector have good concepts. But the lack of adequate local monitoring results in the "privatization" of many funds that are destined for the family sector. It is necessary to set up professional monitoring systems with the participation of civil society actors. It is also necessary to install independent complaint mechanisms, which can be contacted by the target group of these programs.
- ▶ It will not be necessary to increase the government budget to have visible impacts on rural development, increased food security and real diversification of the Angolan economy. It will be enough to use the money that the government and

public banks have spent in the past for "ghost mega-projects" in the future for programs aimed at increasing the productive capacity of the family sector. The private agricultural sector in Angola could play an important role as "facilitator" and "co-operator" in these programmes.

Recommendations for Angolan civil society

- ▶ So far there are few examples where Angolan civil society has been able to defend the lands of rural communities against the interests of national or international investors. It is necessary to join forces between national NGOs and international partners. The example of the joint struggle against the Horizon 2020 megaproject by politician Silvestre Tulumba shows that it is even possible to stop illegal occupations by well-influenced people. This type of alliance should be the general rule and not an exception.
- ▶ Continue the effort to support producer associations, mainly in the thematic areas of institutional strengthening, financial management, small scale irrigation systems and marketing of agricultural products.

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Annex 2 - The dimension of agricultural and forestry mega-investments in Angola

Informação baseada em Land Matrix (http://www.landmatrix.org/en/get-the-detail/by-target-country/angola/?order_by=)											
Deal ID (Land Matrix) / Número por fonte	Local	Nome do investidor	País de origem do investidor	Plano de investimento	Estado da negociação	Estado da implementação	Área planificada	Área da concessão	Área de produção	Plantas cultivadas	Fonte de informação
1094	Província Kuanza Norte	Gleinol	Portugal	Biocombustíveis	[2008] Contracto assinado	Não conhecido	13.000	13.000		Jatropha	Land Matrix
1098 (V)	Cacusso, província de Malanje	BIOCOM Lda.: Odebrecht S.A. (40%), Grupo COCHAN (40%), Sonangol (20%)	Angola, Brasil	Biocombustíveis, produção de açúcar, etanol	[2006] Contracto assinado	[2012] Produção iniciada	[81000]	[81000]	[11000]	Cana de açúcar, etanol	Land Matrix http://angolarising.blogspot.com/2012/05/angolas-sweet-success.html
1099	Província de Uíge	Lonrho Plc	Grã Bretanha	Agricultura de rendimento	[2009] Contracto assinado	Não conhecido	25.000	25.000		Arroz	Land Matrix
1101	Província Bengo	Atlantica Group , Nzogi Yetu, Coroa Gest, Lion	Portugal, Angola	Agricultura diversa	Concluído (contracto assinado)	Não conhecido	20.000	5.000		Óleo de palma	Land Matrix
1103	Província de Cunene	Quifel Holdings	Portugal	Biocombustível, alimentos diversos	[2010] Concluído; contracto assinado)	Fase inicial (ainda não há produção)	40.000	10.000	0	Jatropha, arroz, gergelim, soja, girassol	Land Matrix
4565	Malanje, Angola	Grupo Tai Hoa Vietnam, Empresa de consultoria do Brasil e produtor de café Angolano (não conhecidos)	Vietnam , Brasil, Angola	Agricultura diversa	[2012] Contracto assinado	Não conhecido	6.000	6.000	0	Café	Land Matrix; https://www.reuters.com/article/vietnam-coffee-angola/vietnam-to-help-angola-rejuvenate-coffee-production-idUSL3E8IA34W20120712
4843	Kuanza Sul, Angola	Governo do Cabo Verde	Cabo Verde	Agricultura diversa	[2015] Contracto assinado	[2015] Projecto não iniciado	7.000	7.000		Milho	Land Matrix
5283 (V)	Fazenda Santo António, Quibala, Kuanza-Sul	Investimento privado nacional.	Angola -- 58 milhões de USD- PCA do Banco BIC	Agricultura diversa, gado bovino, produção agrícola não alimentar	Contracto assinado	Em produção	14.000	5.500	3.000	Mandioca, cereais, milho, ração animal, soja, hortícolas	Land Matrix
5285	Aeroporto Waku-Kungo, província Kuanza Sul	Grupo Tahal	Países Baixos	Gado bovino e agricultura diversa	Contracto assinado	Em produção	5.000	5.000		Milho, fruticultura, pimenta, batata reina, mandioca, soja, girassol, batata doce, tomate, hortícolas	Land Matrix
5661	Kuando Kubango, Negage (província de Uíge), Cacusso (província de Malanje, Waku Kungo (província de Kuanza Sul)	Costa Negócios	Brasil	Agricultura não especificado	[2016] Concluído (Contracto assinado)	[2016] Produzindo	25.000	25.000	3.000	Milho, soja	Land Matrix
Total Land Matrix (10 casos)							155.000	101.500	6.000		

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Investimentos baseadas em pesquisa de Rainer Tump - Dezembro de 2017 (atualizado em Janeiro de 2019)											
Deal ID (Land Matrix) / Número por fonte	Local	Nome do investidor	País de origem do investidor	Plano de investimento	Estado da negociação	Estado da implementação	Área planificada	Área da concessão	Área de produção	Plantas cultivadas	Fonte de informação
1	Província Bengo	Não conhecido (o projecto foi anunciado pela Camara Angola-China para Comercio	China	Agricultura diversa	Não concluído	Não iniciado	20.000			Cana de açúcar	https://www.farmlandgrab.org/post/view/26734-angola-and-china-intend-to-implement-sugarcane-projects-in-bengo
2	Comuna de Gangula, Município de Sumbe, Kwanza Sul	General Eusébio de Brito Teixeira, Governador de Kwanza-Sul, coproprietário de Ebrite Filhos Ltd.	Angola	Gado bovino e agricultura diversa	Concessão recebida	Não conhecido	30.000	30.000		Nao conhecido	https://www.makaangola.org/2016/01/land-grabbing-as-a-path-to-riches-and-status-in-angola/
3	Província Kuanza Sul	Sindika Dokolo	Angola	Agricultura	Nao conhecido	Não conhecido	7.632			Nao conhecido	https://www.makaangola.org/2016/02/as-
4 (V)	Municípios de Cacuso, Malanje e Cangandala (Província de Malanje)	Sociedade de Desenvolvimento do Polo Agroindustrial de Capanda - SODEPAC (Cimagro Lda, Odebrecht Angola Lda, APB, e Sagia); Biocom, inclui as fazendas Pungo-a-Ndongo e Pedras Negras	Angola, Brasil	Implementação do Polo Industrial de Capanda	Não conhecido	Não conhecido	411.000	411.000	16.000	Polo agroindustrial para cana de açúcar, milho e outras culturas de rendimento	https://www.farmlandgrab.org/post/view/27403-angola-companies-invest-over-usd-300-million-in-agro-industry ; https://macaahub.com.mo/2017/12/29/pt-investimentos-no-polo-de-capanda-em-angola-ainda-longo-do-previsto/ http://sodepacangola.com/joomla/images/acc_essolivre/4c2f.pdf 104.000 hectares dos 411.000 ha são áreas de proteção ecológica Apoiado pela FAO no valor de 344 milhões USD (AGRIX)
5	Município de Curoca, Província Cunene	Silvestre Tulumba, "PROJECTO HORIZONTE 2020"	Angola	Agricultura	Informações não confirmadas sobre concessão	Obras de construção iniciadas	32.000	32.000		Não conhecido	Estudo publicado por ISSA, Alemanha; Vídeo: https://www.youtube.com/watch?v=fbL_Cx3qaMw
6	Calueque, Província de Cunene	Marubeni Corp.	Japão	Agricultura	Não conhecido	Não conhecido	75.000			Cana de açúcar	https://www.farmlandgrab.org/post/view/23098-japans-marubeni-corp-to-produce-sugar-
7	Diversas províncias	CITIC	China	Agricultura e criação de gado bovino	Não conhecido	Não conhecido	110.000			Soja, milho, cana de açúcar, gado bovino	https://www.farmlandgrab.org/post/view/25871-feeding-the-worlds-most-populous-nation-sino-lusophone-agricultural-co-operation-
8	Província Bengo	Cia de Bioenergia de Angola Lda (Biocom) (40 porcentos na posse de Odebrecht e 40 porcentos na posse da companhia Angolana Cochran SA, qual é controlado pelo general Leopoldino Fragoso do Nascimento Sonangol tem 20 porcentos)	Angola, Brasil	Cana de açúcar e produção de etanol	Concessão recebida	Construção foi anunciado em 2015	42.000	42000	3000	Cana de açúcar, etanol	https://www.farmlandgrab.org/post/view/24964-angolas-750-million-sugar-to-fuel-project-to-start-in-june https://macaahub.com.mo/2018/11/16/pt-companhia-de-bioenergia-de-angola-fecha-campanha-de-2018-com-producao-de-73-mil-toneladas-de-acucar/
9 (V)	Longa, Província de Kuando	Gesterra	Angola (construção (3 anos) e gestão inicial (2 anos) por uma empresa chinesa; financiamento chinês)	Arroz	Concessão sem consultas comunitárias	Iniciado em 2018; parado devido falta de fundos	12.000	12000	0	Arroz	AGRIX 2015: DUTCH AGRIFOOD PRIVATE SECTOR INVOLVEMENT IN ANGOLA, página 82 f.
10 (V)	Macuso, província de Malanje	Fazenda Pedras Negras (gerida por Gesterra)	Angola	Agricultura	Produção parou devido má gestão e falta de recursos	Iniciado em 2014	[26000]	[26000]	0	Planificado: agricultura diversa, arroz, horticultura, frutas	AGRIX 2015: DUTCH AGRIFOOD PRIVATE SECTOR INVOLVEMENT IN ANGOLA

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Deal ID (Land Matrix) / Número por fonte	Local	Nome do investidor	País de origem do investidor	Plano de investimento	Estado da negociação	Estado da implementação	Área planificada	Área da concessão	Área de produção	Plantas cultivadas	Fonte de informação
11	Província da Huila	Grupo Etosha (GE) do Paulo Kassoma	Angola	Gado bovino e produção de batata reina	Finalizado	Em produção	10.000	10.000	10.000	Gado bovino e produção de batata reina	AGRIX 2015: DUTCH AGRIFOOD PRIVATE SECTOR INVOLVEMENT IN ANGOLA
12 (V)	Macuso, província de Malanje	Fazenda Pungo Adongo (gerida por Gesterra)	Angola	Agricultura	Produção parou devido má gestão e falta de	Parado (entrou em falência)	[33000]	[33000]	0	Feijões e milho	AGRIX 2015: DUTCH AGRIFOOD PRIVATE SECTOR INVOLVEMENT IN ANGOLA
13	Lubango, Província da Huila	Mecanagro	Angola	Agricultura	Finalizado	Em produção	30.000	30.000	4.000	Hortícolas diversas	AGRIX 2015: DUTCH AGRIFOOD PRIVATE SECTOR INVOLVEMENT IN ANGOLA
14 (V)	Município de Menongue, Província Kuando Kubango	Grupo Agropecuária Rio Cafuma	Angola	Agricultura; Produção anual de 64 mil toneladas de milho e 20 mil toneladas de soja	Não conhecido	Não conhecido	2.000			Soja	http://www.redeangola.info/menongue-terafazenda-avaliada-em-usd-206-milhoes/
16 (V)	Município de Cuchi, Província de Kuando Kubango	Não conhecido (iniciativa de investidores brasileiros); O objectivo era de receber apoio do Banco Nacional para Desenvolvimento BNDES do Brasil	Brasil, Angola	Eucalipto, gado bovino	Não conhecido	Segundo o investidor, uma fazenda modelo deveria ser operacional; na área nada foi encontrado	250.000	5.000	0	Plantação de eucalipto, criação de gado bovino, aves para frango	http://www.angop.ao/angola/pt_pt/noticias/economia/2016/1/7/Cuando-Cubango-Projecto-fazendas-impulsiona-economia.b6f5fef6-3cf6-45c8-9fdb-5af7c083a002.html
17	Projecto Camaingala, Município Camanongue, Província de Moxico	Gesterra e um general desconhecido	Angola (Governo e investimento privado)	Agricultura	Não conhecido	Não conhecido	22.400				Malungo Germano, LWF Angola; https://www.afrika-sued.org/files/presentation_land_conflicts_malungo_germano.pdf
18	Províncias de Malanje e Kuanza Sul	Não conhecido (acordo entre os governos de Angola e China)	China	Agricultura	Não conhecido	Anunciado em 2015	500.000			Não conhecido	http://club-k.net/index.php?option=com_content&view=article&id=21231:pr-pede-credito-25-bilhoes-de-dolares-a-china&catid=8:bastidores&lang=pt&Itemid=1
Total pesquisa Rainer Tump (17 casos)							1.554.032	572.000	33.000		

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Investimentos adicionais baseadas em informações da Rede Terra Angola											
Deal ID (Land Matrix) / Número por fonte	Local	Nome do investidor	País de origem do investidor	Plano de investimento	Estado da negociação	Estado da implementação	Área planificada	Área da concessão	Área de produção	Plantas cultivadas	Fonte de informação
19	Municípios de Chibia e Cuvango, Província da Huila	Jardins da Yoba	Angola	Agricultura	Finalizado	Em produção	15.000	15.000	600		Rede Terra Angola
20	Município de Caxito	Caxito Rega, SA. (70 % Estado Angolano e 30% companhias privadas)	Angola	Agricultura diversa	Concluído	Produção iniciou	50.000	50.000	4.628	Agricultura diversa	Rede Terra Angola
21 (V)	Município da Quibala, Comuna de Cariango, Província Kuanza Sul	Terra do Futuro (financiado pelo Banco BDA)	Angola	Agricultura	Concluído	Em produção	35.000	35.000	80		Rede Terra Angola
22	Município Icolo e Bengo, província de Luanda	Pólo Integrado de Desenvolvimento da Quiminha (apoiado pelo governo de Angola)	Angola	Agricultura	Concessão fornecida	Produção iniciada	100.000	100.000	5.000		Rede Terra Angola
23 (V)	Província Kuanza Sul, Município da Quibala	Grupo Nova Agro Líder, S.A.	Angola (com gestão portuguesa)	Agricultura	Concluído	Em produção	15.000	10.000	3.000		Rede Terra Angola
Total informação Rede Terra - 5 casos)							215.000	210.000	13.308		

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Investimentos adicionais baseadas em informações da ACM Kuanza Sule e de Olípio Oliveira											
Deal ID (Land Matrix) / Número por fonte	Local	Nome do investidor	País de origem do investidor	Plano de investimento	Estado da negociação	Estado da implementação	Área planificada	Área da concessão	Área de produção	Plantas cultivadas	Fonte de informação
24	Kilenda e Amboim, Kuanza-Sul	Programa Sócio Agro-Indústria do Kwanza Sul (Prosai) promovido pelo GoA e o sector privado	Angola	Agricultura	Não conhecido	Parado, não iniciado	195.500	7.500	0	Palmar com 17 fab	http://www.portalangop.co.ao/angola/pt_pt/noticias/economia/2014/0/2/Programa-agroindustria-relanca-producao-dendem-Kwanza-Sul,3b3adfb6-7fa9-47b9-b7d0-a49b00c580a9.html
25	Sumbe e Porto Amboim, Kuanza Sul	Programa de relançamento do algodão (GoA)	Governo de Angola (\$ 14.756.000) e Governo da Coreia de Sul (\$ 15.981.000)	Agricultura	Concluído	Infraestrutura concluída e produção iniciada	5.000	2.500	500	Produção de algodã	http://www.angop.ao/angola/pt_pt/noticias/economia/2016/5/24/Cuanza-Sul-Producao-algodao-esta-forja,4337b097-86bf-4502-ae6e-784f2892243b.html
26	Waku Kungo, Província Kuanza Sul	SEDIAC	Angola	Agricultura	Não conhecido	Não conhecido	10.000	10.000	0	Agricultura	Ernesto Cassinda, ACM Kuanza Sul
27 (V)	Quibala (Kuanza Sul província), Kambondo (Kuanza Norte província)	Investimento privado-financiado pelo BDA	Angola	Agricultura	Concluído	Produzindo	8.000	8.000	1.500	Produção de variados productos e agropecuária etc.	Ernesto Cassinda, ACM Kuanza Sul Foi visitado; boa relação com as aldeias vizinhas; sérios problemas financeiros e de obter divisas
28	Província Kuanza Sul, Município da Quibala	REFRIANGO de Angola	Angola (empresa internacional e presença em 10 países. A sede em Angola é em Luanda	Agricultura, fruticultura	Concluído	Em produção	4.500	4.500	600	Agricultura - batata rena, cebola, cenoura	Ernesto Cassinda, ACM Kuanza-Sul
29	Norte da província Huíla (Quilengues?)	American Tobacco	USA/UK	Produção de tabaco	Não conhecido	Em produção	10.000	10.000	1.200	Tabaco	Fonte: Alípio Oliveira, Lubango (As carrinhas deste são vistas constantemente na Huíla, Lubango porque já no passado colonial eles compravam tabaco angolano de Quilengues)
30	Norte da Huíla, Quilengues	Jembas	Angola	Agricultura diversa, gado bovino, produção agrícola não-alimentar, madeira	Informações não confirmadas sobre concessão	Em produção	10.000	10.000	1.000	Agricultura, exploração de madeira, criação de gado bovino, aves para frango	Fonte: Alípio Oliveira, Lubango
31	Município do Kuvango	SRR (Rui Kapossi, irmão do Tulumba)	Angola	Produção Agrícola e industria	Informações não confirmadas sobre concessão	Iniciado em 2017	5.000	1.500	1.500	Milho, arroz	Fonte: Alípio Oliveira, Lubango

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Deal ID (Land Matrix) / Número por fonte	Local	Nome do investidor	País de origem do investidor	Plano de investimento	Estado da negociação	Estado da implementação	Área planificada	Área da concessão	Área de produção	Plantas cultivadas	Fonte de informação
32	Município da Matala Perímetro Agrícola, Huila	Empresa Chinesa	China	Produção Agrícola e indústria	Informações não confirmadas sobre concessão	Iniciado em 2015	513	513	440	Milho, arroz, hortícolas..	Fonte: Alípio Oliveira, Lubango
33	Município Mussende, Província Kwanza-Sul	General Alberto Neto	Angola	Agricultura diversa e gado bovino	Concessão recebida em 2015	Iniciado em 2015	65.000	65.000	0	Agricultura diversa	Fonte de Kwanza Sul. Não há informação recente (projecto foi anunciado em 2015). General A. Neto tem uma concessão de 65.000 ha em Kwanza-Sul e está procurando parceiros para o investimento e a gestão conjunta.
34	Kwanza-Sul e Malanje (sem informação detalhada)	Dr. Janus Salai e ex-colonos alemães	Angola e Alemanha	Agricultura diversa	Concessão pedida em 2014		40.000	40.000	0	Agricultura diversa	Fonte de Kwanza Sul. Não há informação recente (projecto foi anunciado em 2014). Dr. Janus informou o governo que queria produzir numa área total de 40.000 ha, mas que ainda estava a procura de parceiros.
35	Huambo	General Nunda	Angola	Agricultura diversa e gado bovino			30.000	30.000	0		Fonte de Kwanza Sul.
36	Huila	Fazenda Mumba, Omatapalo, Fernando Nascimento	Angola	Milho, arroz, trigo, soja	Informações não confirmadas sobre concessão	Iniciado em 2017	22.000	22.000	15.000	Milho, arroz, trigo, soja	Fonte de Kwanza Sul.
37 (V)	Kwanza-Sul, Município Cariango	Projecto "Terra do Futuro", PTF / SA	Angola, financiamento do BDA	Milho, soja, feijão.			35.000	35.000	80	Milho, soja, feijão.	Fonte de Kwanza Sul. O projecto pretende criar fazendas médias para 60 jovens fazendeiros (parte da UNITA) com 200 ha para cada um. Produção de milho, soja, feijão. http://www.cciportugal-angola.pt/wp-
38	Kwanza-Sul, Município Waku-Kungo	SEDIAC -Fazenda média 13	Angola				18.000	13.000	5.000		Fonte de Kwanza Sul.
39 (V)	Kuando Kubango, Município de Cuchi	Bovinos Sudoeste de Angola (BSA) + Costa Negócios, Modolax, LM-Grupo (Brasil)	Angola + Brasil	Projecto de constituição de 50 fazendas			20.000	10.000	0		Fonte de Kwanza Sul. Constituição 50 Fazendas no Cuchi: produção hortícola, pecuária e eucaliptos -abastecimentos dos fornos da Companhia Siderúrgica do Cuchi, (94 km oeste de Menongue) onde passa caminhos de ferro Mocâmbes https://www.sapo.pt/noticias/brasileiros-instalam-no-sul-de-angola-40_56cad8689df077f55b4b77d
Total pesquisa ACM-KS & Olípio Oliveira & Rainer Tump 2018 (16 casos)							478.513	269.513	26.820		
Área total Land Matrix + pesquisa Rainer Tump + Rede Terra + ACM-KS + Olípio Oliveira + pesquisa 2018 (47 casos)							2.402.545	1.153.013	79.128		

Anexo 3 - The 12 major investments in agricultural and forestry in Angola

Top 12 investments in Angola by planned area									
Order by planned area	Location	Name of investor	Country of origin of the investor	Investment plan	Trading status	Status of implementation	Planned area	Requested area	Production area
1	Provinces of Malanje and Kuanza Sul	Not known (agreement between the governments of Angola and China)	China	Agriculture	Not known	Announced in 2015	500.000	Not known	Not known
4	Municipalities of Cacusso, Malanje and Cangandala (Malanje Province)	Sociedade de Desenvolvimento do Polo Agroindustrial de Capanda - SODEPAC (Cimagro Lda, Odebrecht Angola Lda, APB, and Sagia); Biocom, includes the Pungo-a-Ndongo and Pedras Negras farms.	Angola, Brazil	Implementation of the Capanda Industrial Pole	Not known	Not known	411.000	411.000	16.000
3	Cuchi Municipality, Kuando Kubango Province	Not known (initiative of Brazilian investors); The objective was to receive support from the National Development Bank BNDES do Brasil.	Brazil, Angola	Eucalyptus, cattle	Not known	According to the investor, a model farm should be operational; nothing was found in the area	250.000	5.000	0
4	Kilenda and Amboim, Kwanza-South	Kwanza Sul Agro-Industry Partner Programme (Prosai) funded by the GoA and the private sector	Angola	Agriculture	Not known	Not started / stopped	195.500	7.500	0

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Order by planned area	Location	Name of investor	Country of origin of the investor	Investment plan	Trading status	Status of implementation	Planned area	Requested area	Production area
5	Several provinces	CITIC	China	Agriculture and cattle breeding	Not known	Not known	110.000	Not known	Not known
6	Municipality of Icolo and Bengo, province of Luanda	Quiminha Integrated Development Pole (supported by the Angolan government)	Angola	Agriculture	Concession provided	Production started	100.000	100.000	5.000
7	Calueque, Cunene Province	Marubeni Corp.	Japan	Agriculture	Not known	Not known	75.000	Not known	Not known
8	Mussende Municipality, Kwanza-Sul Province	General Alberto Neto	Angola	Miscellaneous agriculture and cattle	Concession received in 2015	Started in 2015	65.000	65.000	0
9	Municipality of Caxito	Caxito Rega, SA. (70 % Angolan State and 30% private companies)	Angola	Miscellaneous agriculture	Completed	Production started	50.000	50.000	4.628
10	Bengo Province	Cia de Bioenergia de Angola Lda. (Biocom) (40 percent owned by Odebrecht and 40 percent owned by the Angolan company Cocham SA, which is controlled by General Leopoldino Fragoso do Nascimento Sonangol has 20 percent)	Angola, Brazil	Sugarcane and ethanol production	Concession received	Construction was announced in 2015	42.000	42000	3000

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Order by planned area	Location	Name of investor	Country of origin of the investor	Investment plan	Trading status	Status of implementation	Planned area	Requested area	Production area
11	Kwanza-Sul and Malanje (without detailed information)	Dr. Janus Salai and former German colonists	Angola and Germany	Miscellaneous agriculture	Concession requested in 2014	Not known	40000	40000	0
12	Kwanza-Sul and Malanje (without detailed information)	Dr. Janus Salai and former German colonists	Angola and Germany	Miscellaneous agriculture	Concession requested in 2014	Not known	40.000	40.000	0
Total 12 largest agricultural and agroforestry investments							1.878.500	760.500	12.628