



## Digital fences: the financial enclosure of farmlands in South America

GRAIN | September 2020

<b>Logistical infrastructure within the expansion and investment zones of agribusiness in South America</b>		
	<b>Country</b>	<b>Infrastructures</b>
<b>Cargill</b>	Brazil	<p>Intermodal yard of the North-South Railway in the municipality of Porto Franco (MA).</p> <p>Bulk terminal in the Port of Santarém (PA).</p>
	Colombia	Cargill and Black River control 25 thousand hectares in the Vichada department through national subsidiaries, such as Colombia Agro.
	Argentina	Cargill S.A.C.I. terminal stores grains, oilseeds and by-products in the San Lorenzo port complex, Santa Fé province.
	Paraguay	Porto Unión: joint venture of Cargill (60%) and Puerto Zeballos (40%) in the province of Asunción.
	Bolivia	Cargill controls the Port of Aguirre, Puerto Quijarro province (51% stake).
<b>Bunge</b>	Brazil	<p>Transshipment station located at the Port of Miritituba (PA).</p> <p>Intermodal yard of the North-South Railway, municipality of Porto Franco (MA).</p>
	Argentina	Bunge Argentina S.A. terminal stores grains, oilseeds and by-products in the San Lorenzo port complex, Santa Fé Province.

		The company controls Terminal 6 at the San Lorenzo port complex in the province of Santa Fé through a <i>joint venture</i> with Aceitera General Deheza.
	Paraguay	Angostura Agroindustrial Complex (CAIASA), located in municipality of Villeta and controlled by Bunge and Louis Dreyfus
<b>ADM</b>	Argentina	ADM controls the Alfred C Toepfer Internacional S.A. terminal, located in the San Lorenzo port complex, Santa Fé province.
<b>Louis Dreyfus</b>	Argentina	Louis Dreyfus terminal located in the Timbués plant, San Lorenzo port complex, Santa Fé province.
	Paraguay	Angostura Agroindustrial Complex (CAIASA), located in Asunción and controlled by Louis Dreyfus and Bunge.
<b>Cofco Agri (Nidera/Noble)</b>	Brazil	<p>Nidera Sementes Ltda: Bulk complex and silo located in Santa Rosa do Tocantins (TO).</p> <p>Two port terminals in the Port of Santos (SP).</p> <p>One soybean crushing plant and one biodiesel plant in Rondonópolis (MT).</p> <p>One soybean crushing plant in Tiquira (MT).</p> <p>One silo in the municipality of Sorriso (MT).</p> <p>Thirteen storage silos throughout the state of Mato Grosso – MT.</p> <p>Contracts for the of the distribution structure of the Port of Barcarena (PA).</p> <p>Cocfo Nigri has signed contracts with the company Hidrovias do Brasil for the provision of services related to cargo transshipment, water transport and port operation at the Port of Miritituba (PA).</p>

	Argentina	<p>Cofco Agri operates two ports in Rosário, Santa Fé province.</p> <p>Storage plants in Salta, Córdoba, Santiago Del Estero, Chaco and Junín.</p> <p>Port terminal in the Port of Quequén.</p> <p>Port terminal in the Port of Bahía Blanca.</p> <p>Cofco Agri controls the Nidera Argentina S.A. terminals and the Noble Timbués Agroindustrial Complex, both located in the San Lorenzo port complex, Santa Fé province.</p>
	Paraguay	<p>Porto Noble Paraguay S.A. in Pacú Cua, city of Encarnación.</p> <p>Five silos in Alto Paraná and in the east of Canindeyú.</p>
<b>SLC Agrícola S.A./Mitsui &amp; Co: SLC-MIT joint venture</b>	Brazil	<p>Fazenda Paladino (farm), located in the municipality of São Desidério (BA).</p> <p>Fazenda Perdizes (farm), located in the municipality of Porto dos Gaúchos (MT).</p>
<b>Mitsui &amp; Co: Agrícola Xingu S.A. (Xingu Agri)</b>	Brazil	<p>Fazenda Tabuleiro V (farm), located in the municipality of São Desidério (BA).</p>
<b>Mitsubishi (Agrex do Brasil)</b>	Brazil	<p>Four production units in the state of Maranhão.</p> <p>Two production units in the state of Tocantins.</p> <p>One production unit in the state of Piauí.</p>
<b>Viterra (Glenconre Agriculture)</b>	Brazil	<p>TEGRAM Complex: port terminal and grain warehouse in the Port of Itaqui (MA).</p> <p>Port terminal in the Port of Barcarena (PA).</p> <p>Grain warehouses in Nova Ubiratã, Santa Carmem, Santa Rita do Trivelato and São Félix do Araguaia (MT).</p>
	Argentina	<p>Port installation and grain warehouse in the Port of Bahía Blanca.</p> <p>Port installation and grain warehouse in the Port of Quequén.</p> <p>Seventeen agricultural warehouses in the province of La Pampa.</p>

	Paraguay	Agricultural warehouse in the province of Katuté, Canindeyú department.
<b>Glencore/Vicentin (Renova joint venture)</b>	Argentina	One crushing plant and one port terminal at the Port of Timbués, located in the municipality of San Lorenzo, Santa Fé province.
<b>Vincentin S.A.I.C.</b>	Argentina	One soybean, sunflower and cotton crushing plant in Ricardone, Santa Fe province.  Port terminal in the Port of Rosário.  One shipping terminal and two soybean plants at the San Lorenzo port Complex, Santa Fé province.  Three meat processing plants located in the FRIAR meat packing complex, municipalities of Reconquista, Avellaneda and Nelson, Santa Fé province.
	Paraguay	Office in Asunción
<b>COSAN (Rumo Logística S.A.)</b>	Brazil	Concession of a section of the North-South Railway to Rumo Logística S.A., located between the municipalities of Porto Nacional (TO) and Estrela d'Oeste (SP).  Sections granted to the Santos (SP)-Corumbá (MS) Railway.
<b>Aceitera General Deheza</b>	Argentina	Terminal 6 of the San Lorenzo port complex, Santa Fe province, controlled through a joint venture of Aceitera General Deheza and Bunge.  Concession of the Nuevo Central Argentino (NCA) Railway to Aceitera General Deheza.
<b>Mónica Semillas</b>	Colombia	The company controls seven thousand hectares of land through subsidiaries in the departments of Vichada and Meta, Orinoquía region.
<b>Investment Funds</b>		
<b>Pátria Investimentos/Blackstone</b>	Brazil	Farms in Luis Eduardo Magalhães (BA) and Mateiros (TO).  Investments in the road to waterway transshipment

		terminal, Port of Miritituba (PA). Sections under concession for pavement of BR-163 highway.
	Argentina	The company holds 30% market share of the water transport in the Paraguay-Paraná Waterway
<b>Brookfield Asset Management (Fazendas Bartira)</b>	Brazil	They own about 570 thousand hectares on land, such as: Fazendas Balsas (BA), Lagoa da Confusão (TO), Couto de Magalhães (TO), Piraquê (TO) and Talismã (TO). They also own several wind farms.
<b>Harvard's Fund (Insolo/GBE/Caracol)</b>	Brazil	They own lands in several places: Barão de Grajaú (MA); Peixe (TO); Barra, Cotegipe, Riachão das Neves and Mansidão (BA); and Baixa Grande do Ribeiro, Santa Filomena, Ribeiro Gonçalves, Palmeira do Piauí, Guadalupe and Sebastião Leal (PI).
<b>TIAA/COSAN Fund (Tellus Brazil)</b>	Brazil	They own land in Correntina, Formosa do Rio Preto, Luis Eduardo Magalhães and São Desidério (BA); Alto Parnaíba, Balsas, Riachão and Tasso Fragoso (MA); Santa Filomena (PI).

- 1) It should be noted that the information provided is always underestimated, as the companies and funds mentioned operate through a number of subsidiaries. It simply illustrates the foreign capital employed within the agribusiness value chain and details the data displayed on the map.
- 2) Logistics infrastructures cross landscapes beyond the expansion and investment zones identified by this report, but they are essential for the construction of these special economic zones of agribusiness.