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ANMD-MRS11-110

CARBON AND SOIL-HEALTH QUANTIFICATION PLATFORMS

A Global Sustainability Due Diligence and Market Research Study

Shortened Table of Contents

Market Snapshot

US$ 420.0m 2025A market value	**US$ 525.0m** 2026E market value	**US$ 2,000.0m** 2032F market value	**25.0%** CAGR 2025A to 2032F
7 regions Geographic coverage	**23 modules** Country modules	**856 exhibits** Including 171 charts	**282 + 101** Organizations and patent records
2020–2032 Historical data and forecasts		**Global** Regional and country coverage	

Report Facts

Report Attribute	Coverage
Report code	ANMD-MRS11-110 | Agricultural AI Solutions
Published	October 2026
Study periods	History 2020H to 2024H | Actual 2025A | Estimate 2026E | Forecast 2027F to 2032F
Length	352 pages | 34 chapters | 7 appendices | 856 exhibits including 171 charts
Geography	7 regions | 23 country modules | Residual regional groupings
Segmentation	5 product segments plus output focus, application, quantification method, end user, business model and deployment
Directories	282 organizations based in 26 countries | 101 patent records across 6 jurisdictions and PCT filings
Licences	Single-User License (SUL) | Global Corporate License (GCL)

This shortened table of contents presents the chapter architecture, main sections and selected exhibits. The detailed table of contents and sample pages are available to registered users at www.anewmarketdynamics.com.

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Part I

Study Framework, Executive Brief and Global Market

Study conventions, headline market findings, methodology and the global and regional analytical foundation.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
F	**Foreword** Purpose of the study • Platform and service market boundary • Coverage and intended readers		i
1	**About This Report** Methodology and quality control • How this report is organized • Reader's guide • Reporting conventions • Scope, inclusion and exclusion rules • Agricultural-AI boundary • Units, currency and 2020H-2032F reporting convention • Evidence grades and range-estimate policy • Overlays • Double-count controls • Exhibit and source-note conventions • Release controls	0	1
2	**Executive Market Brief** Key market developments • The market in brief • Market outlook in five statements • Regional and country market outlook • Policy and classification environment • Key market findings • Key risks and adoption constraints • Implications by stakeholder type • Indicators to track • Industry development timeline • Adoption, model-performance and evidence signals **Selected exhibits** *Exhibit 1: Global Market Value, 2020H-2032F (Chart) | Exhibit 4: Regional Market Value and Growth, 2025A versus 2032F*	6 1 chart	3
3	**Executive Summary and Market Metrics Dashboard** What changed this year • What the market is worth and why • Regional and country opportunity ranking • Policy and classification outlook • What the integrated analysis adds • Where the risks are • Observed deployment outcome patterns • KPI dashboard with ranges **Selected exhibits** *Exhibit 9: Top Ten Country Markets by Absolute Value Addition, 2025A-2032F | Exhibit 10: Global KPI Dashboard, 2025A and 2032F*	5 2 charts	7
4	**Global Market — Dynamics, Size and Outlook** Industry background and origins • Industry structure and participant map • Market drivers • Market restraints and challenges • Opportunities and strategic frameworks • Global market size and forecast • Market model conversion logic • Agricultural-AI boundary and primary segmentation • Applications across crops, livestock and buyers • Hectares, programs and revenue measurement **Selected exhibits** *Exhibit 12: Platform Component Stack | Exhibit 13: Industry Structure by Layer*	14 2 charts	10
5	**Regional Markets — Seven-Region Overview** Regional dashboard • Regional value and share comparison • Regional demand character • Regional opportunity ranking • Regional crop, connectivity and evidence-priority map **Selected exhibits** *Exhibit 31: Regional Share of Global Value, 2025A (Chart) | Exhibit 34: Regional Character Map*	9 3 charts	19
6	**How to Read the Country Modules** Module structure and conventions • Full-format and consolidated modules • Data bases and rounding • Country-module requirements	0	23

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Part II

Regional, Country, Segmentation and Demand Analysis

Seven-region coverage, 23 country modules and the market series used to compare value, adoption and demand.

No.	Chapter, Main Sections and Selected Exhibits	Exhibits	Page
7	**North America — Regional Analysis and Country Modules** Regional overview • United States • Canada • Mexico • Rest of North America **Highlights** *Value, segment and overlay series for three country modules | Corporate insetting, VM0042 and CAR cropland programs and the April 2025 US program reset*	94 20 charts	**24**
8	**Europe — Regional Analysis and Country Modules** Regional overview • Denmark-Led Nordics • Belgium • France • Germany • United Kingdom • Rest of Europe **Highlights** *Value, segment and overlay series for five country modules | EU CRCF, Label Bas-Carbone and Denmark's 2030 agricultural carbon tax*	148 32 charts	**53**
9	**Asia Pacific — Regional Analysis and Country Modules** Regional overview • India • Australia • China • Southeast Asia • Rest of Asia Pacific **Highlights** *Value, segment and overlay series for four country modules | Smallholder aggregation in India, Australia's ACCU method and rice-methane measurement*	121 26 charts	**97**
10	**Latin America — Regional Analysis and Country Modules** Regional overview • Brazil • Argentina • Colombia • Chile • Rest of Latin America **Highlights** *Value, segment and overlay series for four country modules | Brazil's ABC+ program, Argentina's no-till base and Colombia's carbon tax*	121 26 charts	**133**
11	**Africa — Regional Analysis and Country Modules** Regional overview • Kenya • South Africa • Nigeria • Egypt • Rest of Africa **Highlights** *Value, segment and overlay series for four country modules | Rangeland programs and Kenya's community benefit-sharing law*	121 26 charts	**169**
12	**Middle East — Regional Analysis and Country Modules** Regional overview • Israel • Saudi Arabia • United Arab Emirates • Rest of Middle East **Highlights** *Value, segment and overlay series for three country modules | Sovereign greening and food-security programs*	94 20 charts	**205**
13	**Rest of World — Regional Analysis and Country Modules** Regional overview • Composition and market character • Value and outlook **Selected exhibits** *Exhibit 734: Rest of World - Value Series | Exhibit 737: Rest of World - Segment Composition, 2025A and 2032F*	4	**233**
14	**Global Market Reporting — Master Series and Reference Tables** Global master series • Regional master series • Country reference tables **Selected exhibits** *Exhibit 738: Global Master Value Series | Exhibit 747: Regional-by-Segment Master Matrix, 2025A (US$ Million)*	11	**234**
15	**Global Segmentation Analysis** Product-type segmentation and primary market split • Secondary segmentation • Overlay axes (non-additive) • Full annual segment series • Cross-tabulation, additivity rules and overlay treatment **Selected exhibits** *Exhibit 749: Primary Segment Value, 2025A versus 2032F | Exhibit 788: Country-by-Segment Matrix, 2025A (US$ Million)*	40 9 charts	**239**
16	**Demand Signals and Forward Indicators** Structural demand signals • Program and policy pipelines • Economic and adoption signals • Indicator dashboard • Leading indicators **Selected exhibits** *Exhibit 789: Forward Indicator Dashboard | Exhibit 790: Leading Indicator Register*	2	**251**
17	**Adjacent-Market Enablers** Adjacent enabler landscape and interfaces • Enabling infrastructure and platforms • Financing and service enablers • Sensing, geospatial, interoperability and lifecycle interfaces **Selected exhibits** *Exhibit 791: Enabling Infrastructure | Exhibit 792: Enabler Interface Register*	2	**253**

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Part III

Competition, Engineering, Innovation, Sustainability and Policy

Competitive structure and participant profiles alongside technology, sustainability due diligence, supply chains and regulatory frameworks.

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18	**Competitive Analysis and Company Profiles** Market shares and concentration reading • North America • Europe • Asia Pacific • Africa • Component, technology and specialist participants • Distribution, service and delivery organizations • AI developers, sensor OEMs, geospatial providers and service providers **Selected exhibits** *Exhibit 793: Structural Concentration Reading | Profiles of 15 organizations*	18	255
19	**Competitive Environment — Structure, Rankings and Matrices** Market structure and concentration reading • Directory-evidence presence rankings • Capability matrices • Competitive outlook • Installed base, footprint and capability benchmark **Selected exhibits** *Exhibit 812: Directory Coverage by Region | Exhibit 813: Platform Capability Matrix - Leading Platforms*	3 1 chart	263
20	**Mergers, Acquisitions, Partnerships and Industry Network Analysis** M&A record • Partnership and alliance patterns • Industry network reading • Ecosystem-network map **Selected exhibits** *Exhibit 814: Selected M&A and Structural Transactions | Exhibit 815: Ecosystem Network Map*	2	265
21	**Product, Platform Engineering and Innovation** Platform configuration comparison • Standards and design-code frame • Crop and workflow fit screening tool • Materials, durability and circularity • Innovation frontier • Configuration engineering deep-dives • Emerging and next-generation technology • Cross-technology system analysis • Architecture, validation and integration framework **Selected exhibits** *Exhibit 816: Configuration Comparison by Segment | Exhibit 818: Patent Filing Activity by Year (Chart)*	5 2 charts	267
22	**Research, Innovation and Funding Environment** Public research programs and soil-carbon science networks • Startup and venture activity • Standards and testing infrastructure • Research, validation and evidence pipeline **Selected exhibits** *Exhibit 821: Selected Funding and Corporate Events | Exhibit 822: Research and Evidence Pipeline*	2	272
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Part IV

Risk, Economics, Implementation and Outlook

Observed outcome patterns, risk, stakeholder implementation, platform economics, KPIs and the directory framework.

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28	**Risk Factors Identified** Integrated risk register • Likelihood-and-impact reading • Mitigants and watch indicators **Selected exhibits** *Exhibit 842: Integrated Risk Register* | *Exhibit 843: Mitigants and Watch Indicators*	2	309
29	**Observed Implementation Patterns by Stakeholder** Manufacturers and providers • Distributors, integrators and installers • End users and buyer organizations • Governments and programs • Financiers and insurers • Implementation responsibilities and buyer criteria **Selected exhibits** *Exhibit 844: Buyer Criteria Checklist*	1	310
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31	**Pricing, Platform Economics and Financing** Platform cost structure • Buyer economics and payback • Financing context and instruments • MRV, subscription and claim-value economics **Selected exhibits** *Exhibit 845: Delivered Cost Drivers* | *Exhibit 846: Indicative Measurement Cost Ranges by Configuration*	3	312
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33	**Key Performance Indicators** Market KPIs • Sustainability KPIs • Delivery KPIs • Performance KPI library **Selected exhibits** *Exhibit 848: Market KPIs, 2025A and 2032F*	1	315
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