

Biodiversity Analytics Platforms

ANMD-MRS18-175 · Environmental AI Applications

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Biodiversity analytics platforms measure and monitor nature — combining environmental DNA (eDNA), bioacoustics, satellite Earth observation and camera-trap AI to quantify species and ecosystem health. Driven by TNFD disclosure and nature-positive finance, they turn biodiversity into measurable, reportable data. This decision-grade study sizes the global market three ways — value, deployments and area assessed (hectares) — across data method, use case and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Measurement underpins all nature-positive action: credible biodiversity data channels finance to conservation, while weak metrics risk nature-washing.

Mapped Sustainable Development Goals:

SDG 15 Life on Land	SDG 14 Life Below Water	SDG 13 Climate Action
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Measurable sustainability outcomes assessed:

- Credible nature metrics for corporate disclosure
- Conservation targeting and biodiversity-credit MRV
- Metric integrity and nature-washing as a material risk
- Data-sovereignty and baseline reliability assessed

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	3 SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Europe leads on disclosure; North America scales on finance; Asia Pacific grows fastest; other regions assessed on their own merits.

- Measurable, reportable nature data from multi-method sensing
- eDNA, bioacoustics, satellite EO and camera-trap AI
- Finance-grade MRV for disclosure and biodiversity credits
- Metric integrity, data-sovereignty and baselines as material risks

MARKET OVERVIEW

From academic survey to finance-grade nature measurement — where verifiable MRV separates disclosure-ready platforms from research tools.

Biodiversity analytics is moving from academic surveys to corporate, finance-grade nature measurement. Demand is driven by TNFD disclosure, nature-positive finance and biodiversity-credit markets across Europe, North America and Asia Pacific. The market is read three ways — value, deployments and area assessed — and forecast under four scenarios, each region reported separately.

- **Europe leads on disclosure** — Germany, France and the UK, anchored by TNFD adoption, the EU nature-restoration agenda and corporate nature-reporting demand
- **North America scales on finance** — the United States and Canada, supported by nature-tech venture funding, biodiversity-credit pilots and corporate commitments
- **Finance-grade MRV is the differentiator** — verifiable, standardised nature metrics separate disclosure-ready platforms from research tools
- **Data method segments the value** — eDNA, bioacoustics, satellite EO and camera-trap AI, each with distinct coverage and economics

REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Country Markets & Drivers
Europe	Disclosure leader	Germany, France, UK, Netherlands — environmental rules, CSRD, climate funding
North America	Finance-driven	United States, Canada — regulation, funding, tech-vendor base
Asia Pacific	Fastest growth	China, Japan, India, South Korea, Australia — deployment scale, climate exposure
Latin America	Biodiversity hub	Brazil, Colombia — megadiverse ecosystems, credit supply
Africa	Conservation hub	Kenya, South Africa — conservation, biodiversity credits
Middle East	Emerging	Saudi Arabia, UAE — environmental strategy, sovereign investment

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • TNFD & nature disclosure mandates • Nature-positive finance & biodiversity credits • Corporate nature-risk & dependency • eDNA & bioacoustics advances • Satellite-EO & AI monitoring 	<ul style="list-style-type: none"> • Biodiversity-metric standardisation gaps • Data-quality & baseline challenges • MRV & credit-integrity scrutiny • Coverage & ground-truth limits • Emerging-market & business-model risk

SEGMENTATION SNAPSHOT

By Data Method	eDNA · bioacoustics · satellite EO · camera-trap AI · modelling
By Use Case	Corporate TNFD · carbon-plus-nature · conservation · restoration
By Application	Corporate TNFD · carbon-plus-nature · conservation · restoration
By End User	Corporates · financial institutions · NGOs · governments
By Business Model	Hardware sale · SaaS · data · managed service
By Scale	Pilot · deployment · enterprise / national-scale

TECHNOLOGY & APPLICATION FINDINGS

Where the category is differentiating fastest — the technology and application fronts that separate leaders from followers:

- **Corporate TNFD** — multi-method platforms quantify nature dependencies and impacts for disclosure
- **Conservation & restoration** — eDNA and bioacoustics track species and ecosystem recovery
- **Carbon-plus-nature** — integrated platforms support biodiversity-credit and co-benefit MRV

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

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COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans eDNA and bioacoustics specialists, satellite and AI-monitoring platforms, and nature-data integrators. Deal activity — TNFD-driven contracts, biodiversity-credit partnerships and nature-tech funding — signals a market forming around finance-grade nature measurement.

Representative players profiled in the full report:

NatureMetrics Ltd. · Pivotal Future Ltd. · Rainforest Connection (RFCx) · Wildlife Insights (Google LLC) · Restor Eco AG · and 20+ further profiled players.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- How large is the global biodiversity analytics market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- Which technologies and methods reshape the addressable market and the cost curve?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs and disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate and natural-capital intelligence and a decision-ready bankability view in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume and the physical-unit views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

WHO SHOULD BUY THIS REPORT

Corporates, financial institutions, NGOs, governments, investors and policymakers, and strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.