

Ecosystem Marketplace



State of Biodiversity Markets Offset and Compensation Programs Worldwide



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About Ecosystem Marketplace

Ecosystem Marketplace, a project of the non-profit organization Forest Trends, is a leading source of information on environmental markets and payments for ecosystem services. Our publicly available information sources include annual reports, quantitative market tracking, weekly articles, daily news, and newsletters designed for different payments for environmental services stakeholders. We believe that by providing solid and trustworthy information on prices, regulation, science, and other market-relevant issues, we can help payments for ecosystem services and incentives for reducing pollution become a fundamental part of our economic and environmental systems, helping make the priceless valuable.

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Introduction



To the Readers

As more and more governments and businesses consider market-like instruments as tools for biodiversity footprint management, it is increasingly important to understand what is happening, where, and how those tools work. It is also critical to provide reliable information free to the public to enable all market participants to make more informed decisions, learn from the experiences of others, and ultimately allow stable, equitable and effective conservation markets to develop. To address this compelling need for more and better information we have written this status and trends report on biodiversity markets. Within the broad spectrum of ‘biodiversity markets,’ we aim to provide a succinct answer to the question ‘What is happening in biodiversity offset and compensation programs around the world?’

There are both mature and nascent payment systems for biodiversity compensation around the world. Each one is a bit different and they often go by different names: biodiversity offsets, mitigation banking, conservation banking, habitat credit trading, fish habitat compensation, BioBanking, complementary remediation, conservation certificates, and many more. Some are based on compliance with regulation while others are done voluntarily for ethical, competitive, or pre-compliance reasons. But they are all efforts to reduce biodiversity loss and build the cost of biodiversity impacts into economic decisions through markets or market-like instruments and payments.

Michael Jenkins

President, Forest Trends

While a ‘biodiversity offset’ program may be preferable from an ecological and social standpoint, more flexible and less arduous forms of impact compensation, in which funds are set aside for biodiversity management or valuable biodiversity is protected elsewhere, can be a first step towards better biodiversity footprint management or even eventually a regulated offset system. It is this movement towards better compensatory mitigation and effective payments and markets for mitigation that is of interest to the report.

To meet those ends, this report provides the status and trends of biodiversity offset and compensatory mitigation programs by geographical region. In each section, the report summarizes the total active programs and developing activities, and broad metrics like total known payments and land area protected or restored. In each region, we also analyze the characteristics of offset programs—what drives the program, how offsets are created, who the buyers and sellers are, and what the unit of credit is. Finally, we look at recent developments in nascent and existing programs in the region.

The reliable, consistent and transparent information provided in this report will enable both experienced and new market participants to make more informed decisions and learn from the experience of others; ultimately allowing fair, stable and transparent conservation markets to develop.

Kate Hamilton

Director, Ecosystem Marketplace

List of Acronyms and Abbreviations

ABP	Associated British Ports	IUCN	International Union for the Conservation of Nature
BBOP	Business and Biodiversity Offsets Program	LGA	Ley General del Ambiente (Argentina)
BCC	Biodiversity Conservation Certificates (Malaysia)	LGEEPA	Ley General de Equilibrio Ecológico y Protección al Ambiente (Mexico)
BLM	Bureau of Land Management (US)	LOTs	Large old trees (Australia)
BTAU	Biodiversity Technical Assistance Units	LPNMA	Lei da Política Nacional do Meio Ambiente (Brazil)
CA DFG	California Department of Fish and Game	MHHC	Manitoba Habitat Heritage Corporation
CBD	Convention on Biological Diversity	NEMA	National Environmental Management Act (South Africa)
CONABIO	Comisión Nacional para el Conocimiento y Uso de la Biodiversidad (Mexico)	NGO	Non-governmental organization
CONAFOR	Comisión Nacional Forestal (Mexico)	NMFS	National Marine Fisheries Service (US)
DbD	Development by Design (TNC)	NOAA	National Oceanic and Atmospheric Association (US)
DFO	Department of Fisheries and Oceans (Canada)	NSW	New South Wales (Australia)
EEAA	Egyptian Environmental Affairs Agency	NSW DECCW	NSW Department of Environment, Climate Change and Water
EIA	Environmental Impact Assessment	OEM	Office of Environmental Markets
ELD	Environmental Liability Directive (EU)	PAE	Plan d'Action Environnementale (Madagascar)
ELI	Environmental Law Institute	PEMEX	Petróleos Mexicanos
EM	Ecosystem Marketplace	PES	Payments for Ecosystem Services
EMP	Environmental Management Plan (Mexico)	PRC	People's Republic of China
EPBC	Environmental Protection and Biodiversity Conservation Act (Australia)	PROFEPA	Procuraduría Federal de Protección Ambiental (Mexico)
EPE	Environmental Protection Enactment (Malaysia)	PVP	Property Vegetation Plan (Australia)
ESA	Endangered Species Act	QMM	QIT Madagascar Minerals
ESC	Environmental Services Certificate (Paraguay)	REDD	Reducing Emissions from Deforestation and Degradation
ESIA	Environmental and Social Impact Assessment	RVMC	Regional Vegetation Management Code (Australia)
EU	European Union	SANBI	South African National Biodiversity Institute
EVC	Ecological vegetation class (Australia)	SEB	Significant Environmental Benefit (Australia)
FCA	Fundo de Compensação Ambiental (Brazil)	SEMARNAT	Secretaría de Medio Ambiente y Recursos Naturales (Mexico)
FOIA	Freedom of Information Act (US)	SNUC	Sistema Nacional de Unidades de Conservação (Brazil)
HADD	Harmful alteration, disruption or destruction (Canada)	TNC	The Nature Conservancy
HCT	Habitat credit trading (US)	UCTF	Uganda Conservation Trust Fund
HCV	High Conservation Value	US ACE	US Army Corps of Engineers
ICMBio	Instituto Chico Mendes de Conservação da Biodiversidade (Brazil)	US EPA	US Environmental Protection Agency
IDEA	Instituto de Derecho y Economía Ambiental (Paraguay)	US FWS	US Fish and Wildlife Service
IFC	International Finance Corporation	UWA	Uganda Wildlife Authority
ILF	In-lieu fee	WCS	Wildlife Conservation Society
IMR	Impact Mitigation Regulations (Germany)	WWF	World Wildlife Fund
INE	Instituto Nacional de Ecología (Mexico)		
INFOR	Instituto Forestal (Chile)		
IPBES	Intergovernmental Platform on Biodiversity and Ecosystem Services		
IPCC	Intergovernmental Panel on Climate Change		

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Mapping the World's Biodiversity Markets



General Status Update

Our research finds 39 existing compensatory mitigation programs around the world, ranging from programs with active mitigation banking of biodiversity credits to programs channeling development impact fees to policies that drive one-off offsets. There are another 25 programs in various stages of development or investigation.

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