

2021 EM Supporters

EM Visionary Supporter:

The Nature
Conservancy 

EM Strategic Supporters:

3Degrees 

American
Carbon
Registry
A FOREST TRENDS INITIATIVE



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EM Global Carbon Survey *Radical Transparency for the Voluntary Carbon Markets*

North American Carbon World 2021

April 27, 2021

The New EM Global Carbon Hub

60 Minutes

Q&A and Open Discussion Throughout

- 1. Welcome & Introductions**
- 2. Buyers Report Key Findings, Regional Euro & North America**
- 3. Q&A**
- 4. Speakers Roundtable – How much does a carbon offset cost?**
- 5. Overview of the EM Global Carbon Hub**
- 6. Q&A and General Discussion**

Speaker: Donofrio

EM Global Carbon Survey: *Who & What's Covered*

Market Role

Project Developers
Investors
Intermediaries (e.g.
Retailers, Brokers)

Contract Structure

Spot
Forward
Futures
Options

Prices & Volumes

Core Carbon Principles
Additional Attributes
Buyers / Demand
Insetting

Global

Africa
Asia
Europe
LatAm & Carib
North America
Oceania

Transaction Mechanism

Over the Counter (OTC)
Online Platform
Retail
Point of Sale
Exchange

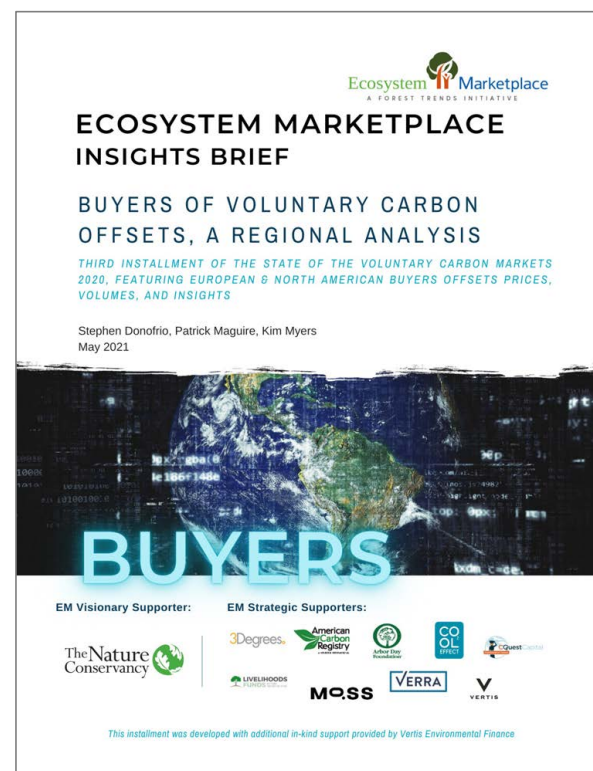
Sentiments

Perceptions
Motivations
Market Confidence
Forecasting

Buyers of Voluntary Carbon Offsets, a Regional Analysis

This third and final installment of Ecosystem Marketplace's State of the Voluntary Carbon Markets (SOVCM) 2020 report offers insights into key trends and developments related to European & North American buyers of voluntary carbon offsets, based upon aggregated and anonymized EM Global Carbon Survey Respondent 2019 calendar year data and interviews.

[DOWNLOAD NOW.](#)



Speaker: Donofrio

Buyers of Voluntary Carbon Offsets, a Regional Analysis

EM Data on Buyers of Carbon Offsets

EM has long tracked the buyers of carbon offsets directly from a global network of hundreds of market participants reporting tens of thousands of current, historical, and future offset transactions through the EM Global Carbon Survey. This uniquely positions EM to be able to determine how demand-side preferences are reflected in prices, volumes, and the variety of core carbon and additional attributes that includes project location, project category & type, vintage, seller type, seller location, primary vs secondary market, buyer type, buyer location, contract delivery structure (e.g., spot, futures), standard, co-benefits, among others.

Important updates for the 2021 EM survey: New questions have been added to enable greater transparency of transactions, particularly for end buyers of carbon offsets, to also track use of offsets to meet specific voluntary commitments (e.g., net zero, carbon neutrality), the buyer's organization name, among other metrics.

Contact us at carbonsurvey@ecosystemmarketplace.com if you have specific data requests.

In 2019, 63% of Buyers of Voluntary Carbon Offsets were European

| | Volume | Price | Value |
|---------------|------------|--------|---------|
| Europe | 23,493,210 | \$3.32 | \$78.1M |
| North America | 12,184,861 | \$3.29 | \$40.1M |
| Rest of World | 1,652,234 | \$4.78 | \$7.9M |

Table 1.
European &
North American
Buyers' Share of
2019 Voluntary
Offset Purchases

Buyers of Voluntary Carbon Offsets, a Regional Analysis

Q&A



Speaker: Donofrio

Speakers Roundtable

**How much does a carbon
offset cost?**



2021 EM Global Carbon Survey

Upgrades and New Processes

Upgrades to the EM Global Carbon Survey: *Why?*

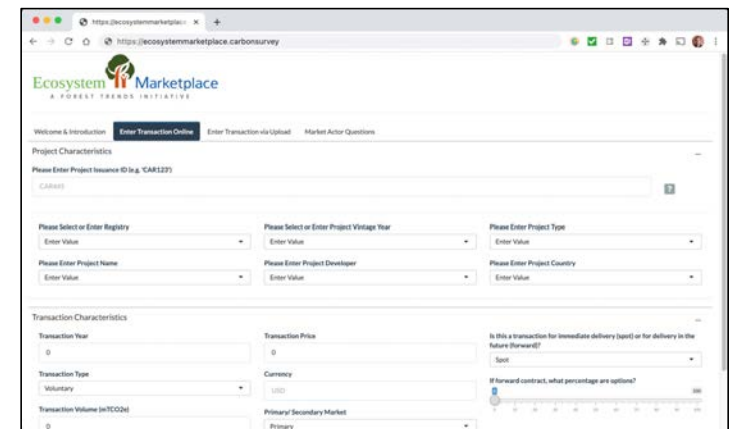
Accommodate a growing market and number of EM Respondents

Increase efficiencies to manage reporting burden

Flexible reporting cycle for daily, monthly, quarterly, annual, bi-annual.

Automation and API database linking

Tailoring questions for specific respondents based on market role, project types, markets engaged with (e.g. CORSIA), other



The screenshot shows a web browser window displaying the 'Ecosystem Marketplace' logo and a survey form titled 'Carbon Survey'. The form is divided into several sections: 'Project Characteristics' with fields for 'Please Enter Project Instance ID (e.g. CAR123)', 'Please Select or Enter Registry', 'Please Select or Enter Project Vintage Year', 'Please Enter Project Name', 'Please Enter Project Developer', and 'Please Enter Project Country'; 'Transaction Characteristics' with fields for 'Transaction Year', 'Transaction Price', 'Transaction Type', 'Currency', 'Transaction Volume (in TCO2e)', and 'Please Select or Enter Market'; and a section for 'Is this a transaction for immediate delivery (spot) or for delivery in the future (forward)?' with a dropdown menu and a checkbox for 'If forward contract, what percentage are options?'. The browser address bar shows 'https://ecosystemmarketplace.com/survey'.



2020 EM Respondents

24% Increase from 2019

Agrocortex Madeiras do Acre
Agroflorestal Ltda.
Arbor Day Foundation
Beijing Qianyuhui International
Environmental Investment
Co., Ltd.
BioCarbon Group Pte Limited
Biofilica Investimentos
Ambientais S.A.
BIOFIX CONSULTORI
Bischoff & Ditze Energy GmbH
& Co.KG
Bluesource
BOCS Foundation
Bonneville Environmental
Foundation
Bosque Sustentable, A.C.
BOSQUES SOSTENIBLES S.L.
Carbon Consulting Company
Carbon Forest Services
Carbon Neutral Pty Ltd.
Carbon Tanzania
Carbon Offsets To Alleviate
Poverty (COTAP)
Carbone boréal
CARBONEXT
Carbonfund.org Foundation
Carbonsink Group S.r.l.
Cassinia Environmental
Clean Air Action Corp
ClearSky Climate Solutions
ClimateCare Oxford Limited
ClimateSeed
ClimeCo Corporation
CO2 Australia
CO2balance UK Ltd
CO2CERO SAS

CO2Logic
Code REDD/ ST
Colbún
Conserv
Cool F
C-O
C
Conservation
ble

Proyecto Mirador
Schneider Electric
Second Nature
Secretaría del Medio Ambiente
del Gobierno de la Ciudad de
México
SFI BV (Sustainable Forestry
Investments)
Sigma Global
Sustainable Carbon - Proyectos
Ambientais Ltda
Taking Root
Tasmanian Land Conservancy
The Association for Coastal
Ecosystem Services (ACES)
The Climate Trust
The Nature Conservancy
United Purpose
University for Life Sciences
Urban Offsets, Inc.
US Forest Capital
Vertis Environmental Finance
Ltd.
Vi-skogen/Vi Agroforestry
WayCarbon
Wildlife Conservation Society
Will Solutions
World Land Trust
Worldview International
Foundation
xpand Foundation
Yayasan Pelestari Ragam Hayati
dan Cipta Fondasi Indonesia
(Yayasan PRCF Indonesia)
ZeroMission AB

2021

2.5X organizations will be
requested to respond to the
EM Carbon Survey

Speaker: Maguire

EM Global Carbon Survey: *Common Questions*

Timeline for 2021

- **Deadline**
 - May 31st Deadline for Inclusion in 1st 2021 State of the Voluntary Carbon Markets report installments
 - Additional deadlines to be announced, however, reporting frequency is determined by each respondent.

EM Global Carbon Survey: *Common Questions*

Timeline for 2021

- **When will the 2021 EM Global Carbon Survey be launched and what time period does it cover?**
 - The 2021 survey when first launched in April will cover Calendar Year 2020 and YTD 2021.
 - Throughout the year, organizations will be prompted to update their organization's EM Global Carbon Survey profile with new transactions and deliveries.
 - Respondents will be able to access and update previous responses.

EM Global Carbon Survey: *Common Questions*

Completeness and Confidentiality

- **I can't answer everything, are partial responses OK?**
 - Yes, organizations can respond with as little or as much information as is available and possible.
- **Due to confidentiality issues, I cannot share individual transaction details, is aggregate data OK?**
 - EM understands the importance of keeping individual respondent data confidential and will furnish it in an anonymized & aggregated format.
 - Respondents are encouraged to provide information on individual transactions, however in some cases this is not possible, so respondents do have the option to roll up individual transactions.

EM Global Carbon Survey: *Common Questions*

Functionalities of the new online survey platform:

- **Save before submitting?**
 - Yes, you'll be able to access and save throughout.
- **We have multiple people at my organization that will be completing various pieces of the survey, can we all access the same online survey profile?**
 - Yes, this is possible however we encourage respondents to be cautious so as to not overwrite each other if logged in at the same time.

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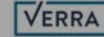
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