

Global Carbon Accounting & Emissions Management Consulting Market Size Study and Forecast by Service Type (Carbon Accounting, Scope 3 Assessment, Decarbonization Strategy, Climate Risk & Scenario Analysis, Carbon Disclosure & Compliance, Carbon Markets & Offsets Advisory, Emissions Reduction Implementation, Carbon Data & Management Systems Consulting), by Organization Size, by End-Use Industry, and Regional Forecasts 2026-2036

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Abstracts

The Global Carbon Accounting & Emissions Management Consulting Market size is expected to grow from USD 13.27 billion in 2025 to USD 48.45 billion by 2036, at a CAGR of 12.5% during the forecast period. Carbon accounting and emissions management consulting are professional advisory services that enable organizations to measure, monitor, report, verify and reduce greenhouse gas emissions across their operations and value chain activities. These services include carbon accounting, Scope 3 emissions assessment, decarbonization strategy development, climate risk analysis, emissions disclosure, carbon market advisory, emissions reduction implementation, and digital management of carbon data. These consulting services are becoming more popular with organizations as they need to comply with changing environmental regulations, strengthen their climate governance, be more transparent with investors, and meet science based targets for reducing their emissions. According to the International Energy Agency (IEA, 2024) global investment in clean energy is projected to exceed USD 2 trillion in 2024, reflecting accelerating commitments to low carbon economic development. Net zero commitments are growing and countries are continuing to strengthen climate mitigation policies, the United Nations Environment

Programme (UNEP, 2024) said. The long term growth of the global carbon accounting and emissions management consulting market is driven by increasing regulatory reporting requirements, rising demands for transparent emissions measurement, investor scrutiny, and corporate decarbonization initiatives.

Global Carbon Accounting & Emissions Management Consulting Market: Key Highlights

The Global Carbon Accounting & Emissions Management Consulting Market size was valued at USD 13.27 billion in 2025 and is estimated to grow to USD 20.92 billion by 2030 at a CAGR of 9.4% during the forecast period supported by increasing corporate climate commitments and increasing disclosures of emissions.

By 2036, the market is expected to reach USD 48.45 billion, growing at a CAGR of 12.5% between 2026 and 2036. The growth is attributed to increased decarbonization strategies, regulations on climate reporting, and enterprise investments in sustainability.

North America is the leading region in the market owing to the matured capabilities in environmental consulting, advanced enterprise sustainability programs, and high corporate ESG reporting adoption.

The Asia Pacific is projected to witness the highest growth among all regional markets, owing to rising industrial decarbonization efforts, government climate policies and increasing corporate emissions reporting.

The most common service type is Carbon Accounting. The accurate measurement of greenhouse gases is the foundation of climate strategy and regulatory compliance for organizations.

Large Enterprises are the largest segment by organisation size, driven by significant sustainability reporting requirements, complex global supply chains and ambitious net zero commitments.

Manufacturing remains the largest end use industry as industrial operations produce significant greenhouse gas emissions that must be continually monitored, reported and reduced through emissions reduction planning.

Research Scope & Methodology

The report offers an extensive examination of the Global Carbon Accounting & Emissions Management Consulting Market, including the development of consulting services, regulatory trends, corporate sustainability initiatives, digital carbon management solutions, competitive dynamics, and regional market analysis for 2025 to 2036. This includes carbon accounting, Scope 3 assessment, decarbonization strategy, climate risk and scenario analysis, carbon disclosure and compliance, carbon markets and offsets advisory, emissions reduction implementation and carbon data and management systems consulting. The analysis of organization size is based on large enterprises and small and medium enterprises. End use industry assessment includes energy and utilities, oil and gas, manufacturing, transportation and logistics, financial services, retail and consumer goods, technology and telecommunications, government and public sector and other industries. The regional analysis covers North America, Europe, Asia Pacific and LAMEA and covers climate policy implementation, emissions reporting frameworks, industrial decarbonization activity, corporate sustainability adoption and consulting demand across developed and emerging economies. The research methodology is a mix of primary interviews of climate risk specialists, sustainability consultants, environmental compliance professionals, corporate sustainability executives, regulatory experts, technology providers, and industry associations operating in the carbon management ecosystem. Secondary research is based on verified publications of government agencies, international organizations, environmental authorities, energy agencies, financial regulators, corporate sustainability reports, and academic institutions, from 2022 onwards. Market sizing is a combination of bottom up analysis based on consulting revenues, enterprise sustainability spend, carbon reporting activity, climate technology deployment and emissions management service contracts. Embed regulatory implementation, carbon pricing, corporate net zero commitments, clean energy investment, digital transformation and competitive benchmarking in forecast models. Data triangulation ensures analytical consistency, forecast reliability, and holistic assessment of long term market dynamics by using multiple supply side and demand side indicators to validate market estimates.

Key Market Segments

By Service Type:

Carbon Accounting

Scope 3 Assessment

Decarbonization Strategy

Climate Risk & Scenario Analysis

Carbon Disclosure & Compliance

Carbon Markets & Offsets Advisory

Emissions Reduction Implementation

Carbon Data & Management Systems Consulting

By Organization Size:

Large Enterprises

Small & Medium Enterprises (SMEs)

By End-Use Industry:

Energy & Utilities

Oil & Gas

Manufacturing

Transportation & Logistics

Financial Services

Retail & Consumer Goods

Technology & Telecommunications

Government & Public Sector

Others

Key Market Players

Accenture Plc

Deloitte Global

PwC (PricewaterhouseCoopers) LLP

Ernst & Young (EY) Global Limited

KPMG International Group Limited

The Anthesis Group

McKinsey & Company

The ERM International Group Limited

SLR Consulting Limited

Boston Consulting Group, Inc. (BCG)

Industry Trends

Carbon accounting platforms are increasingly embedding artificial intelligence, automation and advanced analytics to improve the accuracy of emissions measurement, speed up reporting workflows and improve enterprise decision making across complex global operations.

Managing Scope 3 emissions remains a strategic consulting priority since indirect value chain emissions often comprise the largest share of organizational carbon footprints. More companies are asking for supplier engagement programs and digital emissions data platforms.

Investor expectations and changing regulatory requirements continue to drive demand for consulting services as organizations improve their governance, risk assessment, scenario analysis and sustainability reporting in response to climate-related financial disclosure frameworks.

Enterprises are replacing spreadsheet based carbon reporting with integrated

environmental data management platforms capable of consolidating emissions information across facilities, suppliers, logistics networks and operational business units.

Corporations are continuing to build science-based emissions reduction strategies to achieve measurable decarbonization roadmaps in line with long-term climate commitments. Increasingly, consulting firms are helping to develop targets, plan implementation and monitor performance.

Carbon management is evolving from regulatory compliance to enterprise value creation. Organizations embed emissions performance into procurement, investment planning, product development, operational efficiency and executive decision making.

Technologies like Internet of Things sensors, cloud platforms, satellite data and advanced analytics are improving emissions visibility and facilitating real time management of environmental performance.

As financial institutions begin to measure financed emissions, analyze climate scenarios and transition risks in their lending, investment management and insurance underwriting activities, demand for specialized climate advisory services is growing.

Carbon markets are evolving as organizations assess voluntary carbon credits, compliance trading systems, and nature-based climate solutions to supplement internal emissions reduction efforts. Independent advisory services continue to be vital for market access and risk assessment.

Decarbonization consulting is getting much more attention in industrial organizations for improving energy efficiency, optimizing manufacturing processes, electrifying operations, and improving long term competitiveness against tightening environmental regulations.

International disclosure frameworks continue to harmonize sustainability reporting, pushing organizations to improve data quality, assurance processes and governance over enterprise-wide emissions reporting systems.

Consulting firms are increasingly offering combined climate expertise and digital transformation capabilities by packaging carbon accounting software, enterprise

resource planning platforms, and sustainability analytics into holistic environmental management solutions.

Market Determinants

Expanding Climate Disclosure Regulations: Governments and financial regulators continue strengthening mandatory climate disclosure requirements, increasing demand for carbon accounting and emissions management consulting services. Organizations require expert guidance to comply with evolving reporting standards, greenhouse gas accounting methodologies, and sustainability assurance frameworks. According to the International Sustainability Standards Board (ISSB, 2024), jurisdictions representing more than half of global GDP have taken steps toward adopting or aligning with ISSB sustainability disclosure standards. Expanding regulatory harmonization encourages enterprises to invest in carbon accounting systems, emissions verification, climate risk assessment, and compliance consulting, creating sustained commercial opportunities throughout the market.

Growing Corporate Net Zero Commitments: Increasing corporate commitments toward net zero emissions continue accelerating demand for comprehensive carbon management consulting. Organizations require strategic support to establish emissions baselines, develop decarbonization roadmaps, implement reduction initiatives, and monitor long term progress. According to the Science Based Targets initiative (SBTi, 2024), more than 10,000 companies worldwide have either validated science based targets or committed to setting them. The rapid increase in corporate climate commitments strengthens recurring demand for carbon accounting, Scope 3 assessment, and emissions management advisory services across multiple industries.

Rising Clean Energy Investment: Global investment in clean energy infrastructure continues creating significant demand for emissions measurement, climate strategy, and sustainability consulting. Organizations participating in renewable energy deployment, electrification, and industrial decarbonization require specialized advisory services to quantify carbon reductions and strengthen ESG reporting. According to the International Energy Agency (IEA, 2024), global clean energy investment is expected to exceed USD 2 trillion in 2024. Expanding low carbon investment increases consulting opportunities across emissions accounting, transition planning, climate risk

assessment, and carbon management implementation.

Increasing Scope Three Reporting: Organizations increasingly prioritize Scope 3 emissions measurement because indirect value chain emissions frequently represent the largest share of corporate carbon footprints. Measuring supplier emissions, logistics activity, purchased goods, and downstream product impacts requires specialized consulting expertise and advanced data management capabilities. According to the United Nations Global Compact (2024), value chain decarbonization continues becoming a strategic sustainability priority for multinational corporations. Growing demand for supplier engagement, emissions estimation, and digital carbon data platforms strengthens long term growth across carbon accounting consulting services.

Limited Emissions Data Quality: Many organizations continue facing challenges associated with fragmented emissions information, inconsistent reporting methodologies, and incomplete supplier data. Poor data quality limits the accuracy of greenhouse gas inventories and complicates regulatory reporting. According to the Organisation for Economic Co operation and Development (OECD, 2024), improving sustainability related corporate reporting remains essential for strengthening transparency across global capital markets. Data inconsistency increases consulting complexity, extends project implementation timelines, and elevates compliance costs for organizations pursuing comprehensive emissions management strategies.

Shortage of Climate Specialists: Growing demand for sustainability consulting continues exceeding the availability of experienced carbon accountants, climate scientists, environmental engineers, and emissions reporting professionals. Limited technical expertise may delay implementation of enterprise decarbonization initiatives and reduce consulting capacity. According to the World Economic Forum (2025), green jobs remain among the fastest expanding employment categories globally as organizations accelerate climate transition activities. Workforce shortages increase consulting costs and create operational challenges for firms seeking to scale climate advisory services across multiple industries.

Opportunity Mapping Based on Market Trends

Expanding Carbon Management Platforms: Enterprises increasingly replace

manual emissions reporting processes with integrated digital carbon management platforms capable of automating greenhouse gas accounting, regulatory reporting, and performance monitoring. According to the International Energy Agency (IEA, 2024), digital technologies continue supporting industrial decarbonization and energy efficiency improvements worldwide. Consulting firms capable of integrating enterprise software with carbon accounting platforms are expected to benefit from expanding digital transformation investments across global organizations.

Growing Supply Chain Decarbonization: Multinational corporations increasingly require supplier emissions assessment and value chain decarbonization strategies to achieve net zero commitments. According to the Science Based Targets initiative (SBTi, 2024), Scope 3 emissions frequently account for the majority of corporate greenhouse gas emissions across many industries. Consulting firms offering supplier engagement, emissions benchmarking, procurement advisory, and supply chain carbon analytics are expected to capture substantial long term commercial opportunities.

Rising Climate Risk Advisory: Financial institutions and multinational corporations increasingly evaluate physical climate risks, transition risks, and regulatory exposure within strategic planning and capital allocation decisions. According to the United Nations Environment Programme (UNEP, 2024), climate resilience planning continues expanding across public and private sectors worldwide. Organizations require advanced scenario analysis, climate modeling, and transition planning capabilities, creating sustained demand for specialized climate consulting services.

Accelerating SME Sustainability Adoption: Small and medium enterprises increasingly adopt carbon accounting and sustainability reporting as customers, investors, and regulators strengthen environmental expectations throughout global supply chains. According to the International Finance Corporation (IFC, 2024), sustainable business practices continue improving long term competitiveness for SMEs across emerging and developed economies. Consulting firms providing affordable digital carbon accounting solutions and scalable advisory services are well positioned to benefit from this expanding customer segment.

Value-Creating Segments and Growth Pockets

Carbon Accounting dominates the service type segment through expanding regulatory reporting and enterprise emissions measurement.

The market is segmented by Service Type: Carbon Accounting, Scope 3 Assessment, Decarbonization Strategy, Climate Risk & Scenario Analysis, Carbon Disclosure & Compliance, Carbon Markets & Offsets Advisory, Emissions Reduction Implementation, and Carbon Data & Management Systems Consulting. Carbon Accounting is currently the dominant market player with an estimated share of 29.8% in 2025. Growing corporate demand for accurate greenhouse gas inventories, regulatory reporting and sustainability performance measurement supports the segment's leadership. Carbon accounting is the basis for emissions disclosure, science based target setting and climate transition planning for all industries. According to the International Sustainability Standards Board (ISSB, 2024), more than half of the world's GDP is now covered by jurisdictions that are adopting or aligning with ISSB sustainability disclosure standards, raising the demand for standardized carbon accounting services from enterprises. The commercial leadership in this segment is further amplified by the rising deployment of digital emissions reporting platforms.

The Scope 3 Assessment segment is anticipated to experience the highest growth over the forecast period, with an estimated CAGR of 14.7%. Organizations are growingly aware that indirect emissions from the value chain often constitute the largest share of their greenhouse gas footprint. We expect rising supplier engagement initiatives, mandatory disclosure requirements and enterprise decarbonization programs to drive demand for full scope 3 consulting services.

Large Enterprises lead the organization size segment through complex global operations and extensive reporting obligations.

Based on Organization Size segment, the market is segmented into Large Enterprises and Small & Medium Enterprises (SMEs). The market share of Large Enterprises is expected to be the highest with an estimated 71.6% in 2025. That dominance is a function of complex international operations, vast supply chain networks, ambitious net zero commitments and extensive sustainability reporting requirements. Multinational organizations need advanced consulting services for carbon accounting, climate scenario analysis, emissions reduction planning, and digital environmental management systems. According to the Science Based Targets initiative (SBTi, 2024), over 10,000 companies have had science based emissions reduction targets validated or are committed to developing science-based targets. Large enterprises are prioritizing enterprise-wide carbon management programs to enhance regulatory compliance, investor confidence and operational resilience.

The Small & Medium Enterprises (SMEs) segment is projected to witness the fastest growth, with an estimated CAGR of 13.8% between 2026 and 2036. Increasing sustainability pressures on global supply chains, improved availability of cloud-based

carbon accounting platforms and growing customer expectations are driving SMEs to embrace professional emissions management solutions.

Manufacturing dominates the end use industry through high industrial emissions and decarbonization investments.

On the basis of End-Use Industry the market is categorized into Energy & Utilities, Oil & Gas, Manufacturing, Transportation & Logistics, Financial Services, Retail & Consumer Goods, Technology & Telecommunications, Government & Public Sector and Others.

The manufacturing segment dominates the market with an estimated 24.9% share in 2025. Industrial manufacturing is a major source of greenhouse gases from energy consumption, operations, and complex global supply chains, and so there is constant demand for consulting in carbon accounting and emissions management. The industrial sector continues to be a major contributor to global energy-related carbon dioxide emissions, highlighting the need for structured decarbonization strategies (IEA, 2024).

Manufacturers are increasingly investing in emissions monitoring systems, energy efficiency programs, renewable energy integration and digital platforms for carbon management to improve their environmental performance and ensure they meet regulations.

The Transportation & Logistics segment is projected to register the highest CAGR of 14.3% over the forecast period. Freight operators, shipping companies, aviation organizations, and logistics providers are still increasing investments in fleet decarbonization, sustainable fuels, route optimization, and emissions reporting systems. The transportation sector is expected to see a faster adoption of specialized carbon management consulting services with increasing regulatory oversight and customer demand for low carbon supply chains.

Regional Market Assessment

North America leads the global market through mature sustainability consulting capabilities and advanced corporate climate governance.

North America is the largest regional market, expected to generate an estimated 38.9% of global revenue in 2025, in the Global Carbon Accounting & Emissions Management Consulting Market. The region is well served by established environmental consulting firms, advanced enterprise sustainability programs, rigorous investor disclosure expectations, and the broad adoption of digital carbon management platforms. The United States continues to drive demand in the region, with increased reporting of climate risk, net zero corporate commitments and the growing uptake of enterprise carbon accounting systems across manufacturing, financial services, technology and energy sectors. The Greenhouse Gas Reporting Program collects annual emissions data from more than 8,000 large industrial facilities and fuel suppliers (EPA, 2024). The infrastructure for emissions reporting is well established. Demand for carbon accounting, emissions management and climate advisory services across North

America continues to grow as climate disclosure requirements, enterprise decarbonization initiatives and sustainable finance strategies are increasingly adopted. Strategic partnerships between consulting firms, enterprise software providers and sustainability technology companies further support the region's long-term market leadership.

Europe strengthens market expansion through comprehensive climate regulation and industrial decarbonization policies.

Europe is one of the most sophisticated markets for consulting on carbon accounting and emissions management, with its far-reaching climate legislation, carbon pricing mechanisms, and corporate sustainability reporting requirements. The adoption of the Corporate Sustainability Reporting Directive (CSRD) and the Corporate Sustainability Due Diligence Directive (CSDDD) continues to raise the reporting requirements for thousands of companies operating in the European Union. The EU ETS is the world's largest carbon market, covering about 40% of the European Union's (European Commission 2024) greenhouse gas emissions. Manufacturing, energy, financial services and transportation companies are investing in carbon accounting, Scope 3 emissions management and climate risk consulting to improve compliance and enable long-term decarbonization strategies. Rising investment in renewable energy, hydrogen infrastructure, circular economy initiatives and industrial electrification across the region continues to create sustained demand for specialized emissions management consulting services.

Asia Pacific emerges as the fastest growing regional market through industrial decarbonization and expanding climate policy implementation.

Asia Pacific is expected to witness the fastest market growth from 2026 to 2036 and is estimated to expand at a CAGR of 14.6%. Rapid industrialization, increased carbon neutrality commitments, rising investment in renewable energy, and stronger environmental regulations continue to drive growth, and the demand for carbon accounting and emissions management consulting is accelerating across the region. China, Japan, South Korea, India, Singapore and Australia are also advancing corporate climate disclosure regimes, as well as investing heavily in digital sustainability technologies. Asia is the largest contributor to global clean energy investment, with rapid growth of renewable power generation and industrial decarbonization programs (IEA, 2024). According to UNESCAP (2024), governments in the region are actively integrating climate resilience and low carbon development into their national economic strategies. Growing export requirements, participation in multi-national supply chains and increasing investor scrutiny are expected to ensure strong demand for carbon accounting, emissions reporting and climate consulting services continues.

LAMEA advances through sustainability investment and expanding climate transition initiatives.

The LAMEA region continues to show strong long term growth potential as governments and enterprises accelerate climate transition strategies, environmental reporting and sustainable infrastructure development. Middle Eastern nations continue to integrate carbon management in national economic diversification programs, especially in energy, industrial manufacturing, and infrastructure sectors. Corporate emissions reporting is gaining traction in Latin America, driven by export market requirements, sustainable finance initiatives, and participation in multinational supply chains. International development institutions are continuing to support African economies to scale up renewable energy deployment and climate resilience programs. According to the World Bank (2024), investment in climate resilient and low carbon development is on the rise in emerging economies to foster long term economic sustainability. Organisations in mining, agriculture, energy, logistics and public infrastructure are increasingly demanding carbon accounting, emissions reduction planning and climate risk advisory services. Consulting firms across the LAMEA region are expected to see commercial benefits from continued developments in environmental governance, digital reporting capabilities and sustainability financing.

Recent Developments

June 2025: Accenture expanded its Climate Change and Sustainability Services portfolio by integrating advanced AI driven carbon accounting tools for enterprise clients. The development strengthens enterprise emissions data automation and reflects growing demand for digitalized carbon management systems across global organizations.

March 2025: Deloitte Global launched an enhanced Scope 3 emissions analytics framework designed to improve supplier level carbon visibility across complex value chains. The initiative reinforces the market shift toward comprehensive value chain decarbonization and emissions transparency.

October 2024: ERM International Group Limited announced expansion of its climate risk and scenario analysis capabilities to support financial institutions in transition risk assessment and regulatory compliance. The move strengthens advisory capabilities in climate risk governance and sustainable finance integration.

July 2024: McKinsey & Company introduced an upgraded net zero transformation advisory platform focusing on industrial decarbonization, emissions reduction implementation, and enterprise sustainability strategy execution. The development reflects rising corporate demand for end to end

decarbonization consulting services.

Critical Business Questions Addressed

What is the current and projected value of the global carbon accounting and emissions management consulting market?

The market is valued at USD 13.27 billion in 2025 and is projected to reach USD 48.45 billion by 2036, driven by regulatory expansion, corporate net zero commitments, and increasing demand for emissions transparency across global industries.

Which service segments are expected to dominate long term consulting demand?

Carbon accounting and Scope 3 assessment services are expected to remain central due to increasing regulatory reporting requirements and value chain emissions measurement obligations across multinational enterprises.

How are regulatory frameworks influencing market expansion?

Mandatory sustainability reporting frameworks, carbon pricing systems, and climate disclosure regulations are significantly increasing enterprise demand for structured emissions measurement, governance, and reporting consulting services.

Which industries are generating the highest consulting demand?

Manufacturing, energy, transportation, and financial services are the leading demand centers due to high emissions intensity, complex supply chains, and increasing decarbonization requirements.

Which regions will shape future market growth?

North America leads in revenue contribution, while Asia Pacific is expected to drive the fastest growth due to accelerating industrial decarbonization, renewable energy expansion, and corporate climate policy adoption.

Beyond the Forecast

Carbon accounting consulting is evolving from a compliance driven service into a strategic enterprise capability embedded within financial planning, procurement decisions, and capital allocation frameworks. Organizations increasingly treat emissions data as a core business metric rather than a reporting obligation.

Competitive advantage in the long term will depend on the integration of digital carbon platforms, AI enabled emissions analytics, and real time sustainability monitoring systems. Consulting firms that fail to digitize service delivery risk margin compression and reduced relevance.

The market is transitioning toward end to end decarbonization ecosystems

where consulting, software, assurance, and climate finance converge. Firms capable of combining advisory expertise with implementation capability and data infrastructure will define leadership across the global carbon management landscape.

Contents

CHAPTER 1. GLOBAL CARBON ACCOUNTING & EMISSIONS MANAGEMENT CONSULTING MARKET REPORT SCOPE & METHODOLOGY

- 1.1. Market Definition
- 1.2. Market Segmentation
- 1.3. Research Assumption
 - 1.3.1. Inclusion & Exclusion
 - 1.3.2. Limitations
- 1.4. Research Objective
- 1.5. Research Methodology
 - 1.5.1. Forecast Model
 - 1.5.2. Desk Research
 - 1.5.3. Top Down and Bottom-Up Approach
- 1.6. Research Attributes
- 1.7. Years Considered for the Study

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. Market Snapshot
- 2.2. Strategic Insights
- 2.3. Top Findings
- 2.4. CEO/CXO Standpoint
- 2.5. ESG Analysis

CHAPTER 3. GLOBAL CARBON ACCOUNTING & EMISSIONS MANAGEMENT CONSULTING MARKET FORCES ANALYSIS

- 3.1. Market Forces Shaping The Global Carbon accounting & emissions management consulting Market (2025-2036)
- 3.2. Drivers
 - 3.2.1. Strengthening Global Climate Regulations and Net-Zero Commitments
 - 3.2.2. Rising Corporate ESG and Sustainability Reporting Pressure
 - 3.2.3. Growth of Carbon Markets and Carbon Pricing Mechanisms
 - 3.2.4. Increasing Adoption of Sustainability Digital Solutions
- 3.3. Restraints
 - 3.3.1. Lack of Standardization in Emissions Reporting Frameworks
 - 3.3.2. High Cost and Complexity of Data Collection and Verification

3.4. Opportunities

3.4.1. Expansion of Scope 3 Emissions Tracking and Reporting

3.4.2. Rapid Growth in ESG and Sustainability Consulting Demand in Emerging Markets

CHAPTER 4. GLOBAL CARBON ACCOUNTING & EMISSIONS MANAGEMENT CONSULTING INDUSTRY ANALYSIS

4.1. Porter's 5 Forces Model

4.2. Porter's 5 Force Forecast Model (2025-2036)

4.3. PESTEL Analysis

4.4. Macroeconomic Industry Trends

4.4.1. Parent Market Trends

4.4.2. GDP Trends & Forecasts

4.5. Value Chain Analysis

4.6. Top Investment Trends & Forecasts

4.7. Top Winning Strategies (2025)

4.8. Market Share Analysis (2025)

4.9. Pricing Analysis

4.10. Investment & Funding Scenario

4.11. Impact of Geopolitical & Trade Policy Volatility on the Market

CHAPTER 5. AI ADOPTION TRENDS AND MARKET INFLUENCE

5.1. AI Readiness Index

5.2. Key Emerging Technologies

5.3. Patent Analysis

5.4. Top Case Studies

CHAPTER 6. GLOBAL CARBON ACCOUNTING & EMISSIONS MANAGEMENT CONSULTING MARKET SIZE & FORECASTS BY SERVICE TYPE 2025-2036

6.1. Market Overview

6.2. Global Carbon accounting & emissions management consulting Market Performance - Potential Analysis (2025)

6.3. Carbon Accounting

6.3.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036

6.3.2. Market size analysis, by region, 2025-2036

6.4. Scope 3 Assessment

- 6.4.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036
- 6.4.2. Market size analysis, by region, 2025-2036
- 6.5. Decarbonization Strategy
 - 6.5.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036
 - 6.5.2. Market size analysis, by region, 2025-2036
- 6.6. Climate Risk & Scenario Analysis
 - 6.6.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036
 - 6.6.2. Market size analysis, by region, 2025-2036
- 6.7. Carbon Disclosure & Compliance
 - 6.7.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036
 - 6.7.2. Market size analysis, by region, 2025-2036
- 6.8. Carbon Markets & Offsets Advisory
 - 6.8.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036
 - 6.8.2. Market size analysis, by region, 2025-2036
- 6.9. Emissions Reduction Implementation
 - 6.9.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036
 - 6.9.2. Market size analysis, by region, 2025-2036
- 6.10. Carbon Data & Management Systems Consulting
 - 6.10.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036
 - 6.10.2. Market size analysis, by region, 2025-2036

CHAPTER 7. GLOBAL CARBON ACCOUNTING & EMISSIONS MANAGEMENT CONSULTING MARKET SIZE & FORECASTS BY ORGANIZATION SIZE 2025-2036

- 7.1. Market Overview
- 7.2. Global Carbon accounting & emissions management consulting Market Performance - Potential Analysis (2025)
- 7.3. Large Enterprises
 - 7.3.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036
 - 7.3.2. Market size analysis, by region, 2025-2036
- 7.4. Small & Medium Enterprises (SMEs)
 - 7.4.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036
 - 7.4.2. Market size analysis, by region, 2025-2036

CHAPTER 8. GLOBAL CARBON ACCOUNTING & EMISSIONS MANAGEMENT CONSULTING MARKET SIZE & FORECASTS BY END-USE INDUSTRY 2025-2036

- 8.1. Market Overview
- 8.2. Global Carbon accounting & emissions management consulting Market

Performance - Potential Analysis (2025)

8.3. Energy & Utilities

8.3.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036

8.3.2. Market size analysis, by region, 2025-2036

8.4. Oil & Gas

8.4.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036

8.4.2. Market size analysis, by region, 2025-2036

8.5. Manufacturing

8.5.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036

8.5.2. Market size analysis, by region, 2025-2036

8.6. Transportation & Logistics

8.6.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036

8.6.2. Market size analysis, by region, 2025-2036

8.7. Financial Services

8.7.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036

8.7.2. Market size analysis, by region, 2025-2036

8.8. Retail & Consumer Goods

8.8.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036

8.8.2. Market size analysis, by region, 2025-2036

8.9. Technology & Telecommunications

8.9.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036

8.9.2. Market size analysis, by region, 2025-2036

8.10. Government & Public Sector

8.10.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036

8.10.2. Market size analysis, by region, 2025-2036

8.11. Others

8.11.1. Top Countries Breakdown Estimates & Forecasts, 2025-2036

8.11.2. Market size analysis, by region, 2025-2036

CHAPTER 9. GLOBAL CARBON ACCOUNTING & EMISSIONS MANAGEMENT CONSULTING MARKET SIZE & FORECASTS BY REGION 2025-2036

9.1. Growth Carbon accounting & emissions management consulting Market, Regional Market Snapshot

9.2. Top Leading & Emerging Countries

9.3. North America Carbon accounting & emissions management consulting Market

9.3.1. U.S. Carbon accounting & emissions management consulting Market

9.3.1.1. Service Type breakdown size & forecasts, 2025-2036

9.3.1.2. Organization Size breakdown size & forecasts, 2025-2036

- 9.3.1.3. End-Use Industry breakdown size & forecasts, 2025-2036
- 9.3.2. Canada Carbon accounting & emissions management consulting Market
- 9.4. Europe Carbon accounting & emissions management consulting Market
 - 9.4.1. UK Carbon accounting & emissions management consulting Market
 - 9.4.2. Germany Carbon accounting & emissions management consulting Market
 - 9.4.3. France Carbon accounting & emissions management consulting Market
 - 9.4.4. Spain Carbon accounting & emissions management consulting Market
 - 9.4.5. Italy Carbon accounting & emissions management consulting Market
 - 9.4.6. Rest of Europe Carbon accounting & emissions management consulting Market
- 9.5. Asia Pacific Carbon accounting & emissions management consulting Market
 - 9.5.1. China Carbon accounting & emissions management consulting Market
 - 9.5.2. India Carbon accounting & emissions management consulting Market
 - 9.5.3. Japan Carbon accounting & emissions management consulting Market
 - 9.5.4. Australia Carbon accounting & emissions management consulting Market
 - 9.5.5. South Korea Carbon accounting & emissions management consulting Market
 - 9.5.6. Rest of APAC Carbon accounting & emissions management consulting Market
- 9.6. Latin America Carbon accounting & emissions management consulting Market
 - 9.6.1. Brazil Carbon accounting & emissions management consulting Market
 - 9.6.2. Mexico Carbon accounting & emissions management consulting Market
- 9.7. Middle East and Africa Carbon accounting & emissions management consulting Market
 - 9.7.1. UAE Carbon accounting & emissions management consulting Market
 - 9.7.2. Saudi Arabia (KSA) Carbon accounting & emissions management consulting Market
 - 9.7.3. South Africa Carbon accounting & emissions management consulting Market

CHAPTER 10. COMPETITIVE INTELLIGENCE

- 10.1. Top Market Strategies
- 10.2. Accenture Plc
 - 10.2.1. Company Overview
 - 10.2.2. Key Executives
 - 10.2.3. Company Snapshot
 - 10.2.4. Financial Performance (Subject to Data Availability)
 - 10.2.5. Product/Services Port
 - 10.2.6. Recent Development
 - 10.2.7. Market Strategies
 - 10.2.8. SWOT Analysis
- 10.3. Deloitte Global

- 10.4. PwC (PricewaterhouseCoopers)LLP
- 10.5. Ernst & Young (EY) Global Limited
- 10.6. KPMG International Group Limited
- 10.7. The Anthesis Group
- 10.8. McKinsey & Company
- 10.9. The ERM International Group Limited
- 10.10. SLR Consulting Limited
- 10.11. Boston Consulting Group, Inc. (BCG)

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