

# Carbon Accounting Software Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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## Abstracts

Carbon Accounting Software is a specialized digital platform designed to quantify, track, and manage greenhouse gas emissions across an organization's operations, enabling precise measurement of carbon footprints and informed sustainability strategies. This technology integrates data from diverse sources—energy usage, supply chains, and transportation—to provide actionable insights for compliance, risk mitigation, and net-zero pathways. By automating calculations aligned with standards like the GHG Protocol and ISO 14064, it transforms raw environmental data into strategic assets, supporting decarbonization roadmaps and stakeholder transparency. The industry is characterized by cloud-native architectures that leverage AI for predictive analytics and anomaly detection, ensuring accuracy amid volatile emission factors. As businesses navigate escalating climate mandates, the sector emphasizes interoperability with ERP systems and ESG platforms, fostering holistic sustainability governance. Despite integration complexities, its role in bridging financial and environmental performance is pivotal, with embedded analytics revealing cost-saving opportunities in Scope 3 reductions. The global market size for Carbon Accounting Software is expected to reach between USD 10.0 billion and USD 15.0 billion by 2025. Positioned as a cornerstone in the burgeoning sustainability tech landscape, it addresses the urgent need for verifiable emissions intelligence. Between 2025 and 2030, the market is forecasted to advance at a compound annual growth rate (CAGR) of approximately 15.0% to 30.0%, propelled by intensified regulatory scrutiny, corporate net-zero pledges, and investor demands for climate-resilient portfolios. This vigorous expansion mirrors the software's evolution from compliance tool to strategic enabler, amid a paradigm shift toward integrated, real-time carbon management.

## Industry Characteristics

Carbon accounting software embodies a synergy of environmental science and enterprise technology, where algorithmic precision meets regulatory rigor to demystify emissions data. Core to its functionality is the aggregation of Scope 1, 2, and 3 emissions via modular dashboards that harmonize disparate inputs, from utility bills to vendor disclosures. Unlike siloed reporting tools, it employs machine learning for scenario modeling, forecasting reduction impacts and flagging high-risk hotspots, thus empowering proactive stewardship.

The sector's hallmark is modularity, with providers offering extensible APIs for ERP fusion, ensuring seamless data flows in polycentric operations. Relative to general ESG platforms, carbon accounting is laser-focused on granularity, incorporating life-cycle assessments and vintage-year tracking to dissect temporal variances. Its efficacy hinges on validated factors from databases like DEFRA or EPA, mitigating uncertainties in indirect emissions.

In enterprise sustainability, the software is transformative, particularly for supply chain opacity; it deciphers vendor footprints via spend-based proxies, catalyzing collaborative decarbonization. For multinationals, it navigates jurisdictional variances, aligning reports to CSRD or SEC mandates, while fostering internal benchmarks for performance parity.

## Regional Market Trends

Carbon accounting software penetration varies by regulatory maturity and industrial heft, with adoption accelerating in emissions-intensive economies.

**North America:** North America asserts primacy, with expansion gauged at 15.0%–25.0% CAGR through 2030. The United States anchors this, propelled by SEC's climate disclosure rules mandating Scope 3 scrutiny, spurring software uptake in energy and finance. California's cap-and-trade extensions amplify demand, while Canada's Clean Fuel Regulations enforce verifiable tracking. Corporate titans like ExxonMobil leverage it for investor-grade reports, with federal grants via the Inflation Reduction Act subsidizing upgrades.

**Europe:** Europe sustains robust momentum, projected at 14.0%–24.0% CAGR. The EU's CSRD unifies reporting, compelling granular audits that software facilitates, especially in Germany's manufacturing belt. France's Article 173

mandates biodiversity-linked emissions, while the UK's TCFD evolutions demand forward-looking analytics. Nordic pioneers like Sweden upscale via public-private consortia, harmonizing national grids with software-driven baselines.

**Asia-Pacific (APAC):** APAC surges ahead, with a 18.0%–30.0% CAGR forecast. China's Dual Carbon goals enforce enterprise-wide inventories, fueling software for steel and cement giants. India's PAT scheme incentivizes efficiency via emissions dashboards, while Japan's GX League pilots blockchain-verified chains. South Korea's K-ETS phases upscale monitoring, blending software with national AI strategies for predictive compliance.

**Latin America:** Latin America advances steadily at 12.0%–22.0% CAGR. Brazil's ABC+ Plan subsidizes agribusiness decarbonization, integrating software for soy and beef footprints. Mexico's carbon tax expansions demand Scope 3 granularity, while Chile's green hydrogen ambitions necessitate lifecycle tools. Regional forums like CAF foster cross-border standards, mitigating data silos.

**Middle East and Africa (MEA):** MEA forges ahead at 16.0%–28.0% CAGR. UAE's Net Zero 2050 embeds software in oil majors' transitions, with Dubai's Green Fund backing pilots. Saudi Arabia's Vision 2030 mandates giga-project audits, while South Africa's carbon tax rebates reward verifiable cuts. African leapfrogging via mobile-integrated platforms addresses rural baselines, countering infrastructure gaps.

## Application Analysis

Carbon accounting software's adaptability fuels segmented dynamism, each harnessing tailored features for emission mastery.

**Large Enterprises:** Commanding 60%+ share, this cohort eyes 16.0%–28.0% CAGR through 2030. Multinationals deploy it for conglomerate-wide audits, excelling in Scope 3 via supplier portals. Trends include AI-orchestrated baselines, enabling dynamic SBTi alignments and value chain optimizations, vital for automotive and retail behemoths navigating tariffs.

**SMEs:** SMEs accelerate at 15.0%–26.0% CAGR, empowered by affordable SaaS tiers. Simplified dashboards democratize access, aiding e-commerce and

logistics in spend-linked proxies. Evolutions encompass templated integrations, slashing onboarding by 50%, and fostering agile pivots amid ESG pressures.

## Company Landscape

The carbon accounting software domain merges legacy ERP titans with agile climate fintechs, pursuing integrated ecosystems.

**SAP SE:** SAP's Sustainability Control Tower, embedded in S/4HANA, processes petabytes for 10,000+ clients, excelling in Scope 3 via Ariba linkages. Its AI-driven forecasts support 1,000+ carbon scenarios, cementing leadership in manufacturing.

**Microsoft:** Cloud for Sustainability unifies emissions in Azure, with 500+ partners; its Copilot AI parses unstructured data, slashing audits by 40% for Dynamics users.

**Persefoni AI:** Unicorn-backed, Persefoni's ledger tracks 5M+ transactions, boasting 99% accuracy via ML; it powers 300+ firms, focusing on financed emissions.

**IBM Corporation:** IBM Envizi aggregates 1B+ data points, with Watson analytics for anomaly detection; adopted by 200+ enterprises for regulatory mapping.

**Sphera:** Sphera's suite handles 10,000+ chemicals, emphasizing LCA; it serves 1,500 clients, integrating with SAP for end-to-end compliance.

**Greenly:** French innovator, Greenly's API scans 50M+ transactions, aiding SMEs; its 99% automation appeals to e-commerce.

**Diligent Corporation:** Diligent's ESG toolset covers 1,000+ boards, with carbon modules for governance; high-trust for finance.

**Salesforce, Inc.:** Net Zero Cloud integrates CRM emissions, serving 150,000+ users; Einstein AI personalizes roadmaps.

**SINAI Technologies:** SINAI's platform models 500+ scenarios, targeting energy; its carbon clock visualizes urgency.

Net0: Calgary-based, Net0's AI offsets 1M+ tons, blending accounting with blockchain for verifiable credits.

## Industry Value Chain Analysis

The carbon accounting software chain spans from data ingestion to strategic actuation, optimizing emissions intelligence.

Raw Materials: Emission proxies and baselines derive from utilities, suppliers, and standards bodies; IoT feeds real-time granularity.

Manufacturing: Platforms synthesize via ETL pipelines, with ML for imputation; custom dashboards render insights.

Distribution: SaaS portals and APIs deliver, with integrations ensuring ERP harmony; marketplaces curate add-ons.

Downstream Applications: Users action via reduction modeling, feeding procurement and reporting; loops refine via audits.

This chain elevates software as a decarbonization accelerator, amplifying enterprise resilience.

## Opportunities and Challenges

Carbon accounting software abounds in avenues as net-zero imperatives intensify. Global pacts like Paris amplify Scope 3 mandates, spurring supply chain tools; AI infusions promise 30% faster audits. SMEs' ESG ascent unlocks affordable tiers, while biodiversity linkages expand to holistic impacts. Emerging markets' green bonds necessitate localized baselines.

Challenges persist: Data silos frustrate integrations, inflating errors; volatile factors confound accuracy. SMEs balk at costs, while regulatory flux demands agility. Bias in proxies risks greenwashing, underscoring validation needs.

## Contents

### **CHAPTER 1 EXECUTIVE SUMMARY**

### **CHAPTER 2 ABBREVIATION AND ACRONYMS**

### **CHAPTER 3 PREFACE**

3.1 Research Scope

3.2 Research Sources

3.2.1 Data Sources

3.2.2 Assumptions

3.3 Research Method

Chapter Four Market Landscape

4.1 Market Overview

4.2 Classification/Types

4.3 Application/End Users

### **CHAPTER 5 MARKET TREND ANALYSIS**

5.1 Introduction

5.2 Drivers

5.3 Restraints

5.4 Opportunities

5.5 Threats

### **CHAPTER 6 INDUSTRY CHAIN ANALYSIS**

6.1 Upstream/Suppliers Analysis

6.2 Carbon Accounting Software Analysis

6.2.1 Technology Analysis

6.2.2 Cost Analysis

6.2.3 Market Channel Analysis

6.3 Downstream Buyers/End Users

### **CHAPTER 7 LATEST MARKET DYNAMICS**

7.1 Latest News

7.2 Merger and Acquisition

- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

## **CHAPTER 8 HISTORICAL AND FORECAST CARBON ACCOUNTING SOFTWARE MARKET IN NORTH AMERICA (2020-2030)**

- 8.1 Carbon Accounting Software Market Size
- 8.2 Carbon Accounting Software Market by End Use
- 8.3 Competition by Players/Suppliers
- 8.4 Carbon Accounting Software Market Size by Type
- 8.5 Key Countries Analysis
  - 8.5.1 United States
  - 8.5.2 Canada
  - 8.5.3 Mexico

## **CHAPTER 9 HISTORICAL AND FORECAST CARBON ACCOUNTING SOFTWARE MARKET IN SOUTH AMERICA (2020-2030)**

- 9.1 Carbon Accounting Software Market Size
- 9.2 Carbon Accounting Software Market by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Carbon Accounting Software Market Size by Type
- 9.5 Key Countries Analysis

## **CHAPTER 10 HISTORICAL AND FORECAST CARBON ACCOUNTING SOFTWARE MARKET IN ASIA & PACIFIC (2020-2030)**

- 10.1 Carbon Accounting Software Market Size
- 10.2 Carbon Accounting Software Market by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Carbon Accounting Software Market Size by Type
- 10.5 Key Countries Analysis
  - 10.5.1 China
  - 10.5.2 India
  - 10.5.3 Japan
  - 10.5.4 South Korea
  - 10.5.5 Southeast Asia
  - 10.5.6 Australia & New Zealand

## **CHAPTER 11 HISTORICAL AND FORECAST CARBON ACCOUNTING SOFTWARE MARKET IN EUROPE (2020-2030)**

- 11.1 Carbon Accounting Software Market Size
- 11.2 Carbon Accounting Software Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Carbon Accounting Software Market Size by Type
- 11.5 Key Countries Analysis
  - 11.5.1 Germany
  - 11.5.2 France
  - 11.5.3 United Kingdom
  - 11.5.4 Italy
  - 11.5.5 Spain
  - 11.5.6 Belgium
  - 11.5.7 Netherlands
  - 11.5.8 Austria
  - 11.5.9 Poland
  - 11.5.10 Northern Europe

## **CHAPTER 12 HISTORICAL AND FORECAST CARBON ACCOUNTING SOFTWARE MARKET IN MEA (2020-2030)**

- 12.1 Carbon Accounting Software Market Size
- 12.2 Carbon Accounting Software Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Carbon Accounting Software Market Size by Type
- 12.5 Key Countries Analysis

## **CHAPTER 13 SUMMARY FOR GLOBAL CARBON ACCOUNTING SOFTWARE MARKET (2020-2025)**

- 13.1 Carbon Accounting Software Market Size
- 13.2 Carbon Accounting Software Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Carbon Accounting Software Market Size by Type

## **CHAPTER 14 GLOBAL CARBON ACCOUNTING SOFTWARE MARKET FORECAST (2025-2030)**

- 14.1 Carbon Accounting Software Market Size Forecast
- 14.2 Carbon Accounting Software Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Carbon Accounting Software Type Forecast

## **CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS**

### 15.1 SAP SE

- 15.1.1 Company Profile
- 15.1.2 Main Business and Carbon Accounting Software Information
- 15.1.3 SWOT Analysis of SAP SE
- 15.1.4 SAP SE Carbon Accounting Software Revenue, Gross Margin and Market Share (2020-2025)

### 15.2 Microsoft

- 15.2.1 Company Profile
- 15.2.2 Main Business and Carbon Accounting Software Information
- 15.2.3 SWOT Analysis of Microsoft
- 15.2.4 Microsoft Carbon Accounting Software Revenue, Gross Margin and Market Share (2020-2025)

### 15.3 Persefoni AI

- 15.3.1 Company Profile
- 15.3.2 Main Business and Carbon Accounting Software Information
- 15.3.3 SWOT Analysis of Persefoni AI
- 15.3.4 Persefoni AI Carbon Accounting Software Revenue, Gross Margin and Market Share (2020-2025)

### 15.4 IBM Corporation

- 15.4.1 Company Profile
- 15.4.2 Main Business and Carbon Accounting Software Information
- 15.4.3 SWOT Analysis of IBM Corporation
- 15.4.4 IBM Corporation Carbon Accounting Software Revenue, Gross Margin and Market Share (2020-2025)

### 15.5 Sphera

- 15.5.1 Company Profile
- 15.5.2 Main Business and Carbon Accounting Software Information
- 15.5.3 SWOT Analysis of Sphera
- 15.5.4 Sphera Carbon Accounting Software Revenue, Gross Margin and Market Share (2020-2025)

### 15.6 Greenly

- 15.6.1 Company Profile

15.6.2 Main Business and Carbon Accounting Software Information

15.6.3 SWOT Analysis of Greenly

15.6.4 Greenly Carbon Accounting Software Revenue, Gross Margin and Market Share (2020-2025)

15.7 Diligent Corporation

15.7.1 Company Profile

15.7.2 Main Business and Carbon Accounting Software Information

15.7.3 SWOT Analysis of Diligent Corporation

15.7.4 Diligent Corporation Carbon Accounting Software Revenue, Gross Margin and Market Share (2020-2025)

Please ask for sample pages for full companies list

## Tables & Figures

### TABLES AND FIGURES

Table Abbreviation and Acronyms

Table Research Scope of Carbon Accounting Software Report

Table Data Sources of Carbon Accounting Software Report

Table Major Assumptions of Carbon Accounting Software Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Carbon Accounting Software Picture

Table Carbon Accounting Software Classification

Table Carbon Accounting Software Applications

Table Drivers of Carbon Accounting Software Market

Table Restraints of Carbon Accounting Software Market

Table Opportunities of Carbon Accounting Software Market

Table Threats of Carbon Accounting Software Market

Table COVID-19 Impact for Carbon Accounting Software Market

Table Raw Materials Suppliers

Table Different Production Methods of Carbon Accounting Software

Table Cost Structure Analysis of Carbon Accounting Software

Table Key End Users

Table Latest News of Carbon Accounting Software Market

Table Merger and Acquisition

Table Planned/Future Project of Carbon Accounting Software Market

Table Policy of Carbon Accounting Software Market

Table 2020-2030 North America Carbon Accounting Software Market Size

Figure 2020-2030 North America Carbon Accounting Software Market Size and CAGR

Table 2020-2030 North America Carbon Accounting Software Market Size by Application

Table 2020-2025 North America Carbon Accounting Software Key Players Revenue

Table 2020-2025 North America Carbon Accounting Software Key Players Market Share

Table 2020-2030 North America Carbon Accounting Software Market Size by Type

Table 2020-2030 United States Carbon Accounting Software Market Size

Table 2020-2030 Canada Carbon Accounting Software Market Size

Table 2020-2030 Mexico Carbon Accounting Software Market Size

Table 2020-2030 South America Carbon Accounting Software Market Size

Figure 2020-2030 South America Carbon Accounting Software Market Size and CAGR

Table 2020-2030 South America Carbon Accounting Software Market Size by Application

Table 2020-2025 South America Carbon Accounting Software Key Players Revenue

Table 2020-2025 South America Carbon Accounting Software Key Players Market Share

Table 2020-2030 South America Carbon Accounting Software Market Size by Type

Table 2020-2030 Asia & Pacific Carbon Accounting Software Market Size

Figure 2020-2030 Asia & Pacific Carbon Accounting Software Market Size and CAGR

Table 2020-2030 Asia & Pacific Carbon Accounting Software Market Size by Application

Table 2020-2025 Asia & Pacific Carbon Accounting Software Key Players Revenue

Table 2020-2025 Asia & Pacific Carbon Accounting Software Key Players Market Share

Table 2020-2030 Asia & Pacific Carbon Accounting Software Market Size by Type

Table 2020-2030 China Carbon Accounting Software Market Size

Table 2020-2030 India Carbon Accounting Software Market Size

Table 2020-2030 Japan Carbon Accounting Software Market Size

Table 2020-2030 South Korea Carbon Accounting Software Market Size

Table 2020-2030 Southeast Asia Carbon Accounting Software Market Size

Table 2020-2030 Australia & New Zealand Carbon Accounting Software Market Size

Table 2020-2030 Europe Carbon Accounting Software Market Size

Figure 2020-2030 Europe Carbon Accounting Software Market Size and CAGR

Table 2020-2030 Europe Carbon Accounting Software Market Size by Application

Table 2020-2025 Europe Carbon Accounting Software Key Players Revenue

Table 2020-2025 Europe Carbon Accounting Software Key Players Market Share

Table 2020-2030 Europe Carbon Accounting Software Market Size by Type

Table 2020-2030 Germany Carbon Accounting Software Market Size

Table 2020-2030 France Carbon Accounting Software Market Size

Table 2020-2030 United Kingdom Carbon Accounting Software Market Size

Table 2020-2030 Italy Carbon Accounting Software Market Size

Table 2020-2030 Spain Carbon Accounting Software Market Size

Table 2020-2030 Belgium Carbon Accounting Software Market Size

Table 2020-2030 Netherlands Carbon Accounting Software Market Size

Table 2020-2030 Austria Carbon Accounting Software Market Size

Table 2020-2030 Poland Carbon Accounting Software Market Size

Table 2020-2030 Northern Europe Carbon Accounting Software Market Size

Table 2020-2030 MEA Carbon Accounting Software Market Size

Figure 2020-2030 MEA Carbon Accounting Software Market Size and CAGR

Table 2020-2030 MEA Carbon Accounting Software Market Size by Application

Table 2020-2025 MEA Carbon Accounting Software Key Players Revenue

Table 2020-2025 MEA Carbon Accounting Software Key Players Market Share  
Table 2020-2030 MEA Carbon Accounting Software Market Size by Type  
Table 2020-2025 Global Carbon Accounting Software Market Size by Region  
Table 2020-2025 Global Carbon Accounting Software Market Size Share by Region  
Table 2020-2025 Global Carbon Accounting Software Market Size by Application  
Table 2020-2025 Global Carbon Accounting Software Market Share by Application  
Table 2020-2025 Global Carbon Accounting Software Key Vendors Revenue  
Figure 2020-2025 Global Carbon Accounting Software Market Size and Growth Rate  
Table 2020-2025 Global Carbon Accounting Software Key Vendors Market Share  
Table 2020-2025 Global Carbon Accounting Software Market Size by Type  
Table 2020-2025 Global Carbon Accounting Software Market Share by Type  
Table 2025-2030 Global Carbon Accounting Software Market Size by Region  
Table 2025-2030 Global Carbon Accounting Software Market Size Share by Region  
Table 2025-2030 Global Carbon Accounting Software Market Size by Application  
Table 2025-2030 Global Carbon Accounting Software Market Share by Application  
Table 2025-2030 Global Carbon Accounting Software Key Vendors Revenue  
Figure 2025-2030 Global Carbon Accounting Software Market Size and Growth Rate  
Table 2025-2030 Global Carbon Accounting Software Key Vendors Market Share  
Table 2025-2030 Global Carbon Accounting Software Market Size by Type  
Table 2025-2030 Carbon Accounting Software Global Market Share by Type  
Table SAP SE Information  
Table SWOT Analysis of SAP SE  
Table 2020-2025 SAP SE Carbon Accounting Software Revenue Gross Profit Margin  
Figure 2020-2025 SAP SE Carbon Accounting Software Revenue and Growth Rate  
Figure 2020-2025 SAP SE Carbon Accounting Software Market Share  
Table Microsoft Information  
Table SWOT Analysis of Microsoft  
Table 2020-2025 Microsoft Carbon Accounting Software Revenue Gross Profit Margin  
Figure 2020-2025 Microsoft Carbon Accounting Software Revenue and Growth Rate  
Figure 2020-2025 Microsoft Carbon Accounting Software Market Share  
Table Persefoni AI Information  
Table SWOT Analysis of Persefoni AI  
Table 2020-2025 Persefoni AI Carbon Accounting Software Revenue Gross Profit Margin  
Figure 2020-2025 Persefoni AI Carbon Accounting Software Revenue and Growth Rate  
Figure 2020-2025 Persefoni AI Carbon Accounting Software Market Share  
Table IBM Corporation Information  
Table SWOT Analysis of IBM Corporation  
Table 2020-2025 IBM Corporation Carbon Accounting Software Revenue Gross Profit

Margin

Figure 2020-2025 IBM Corporation Carbon Accounting Software Revenue and Growth Rate

Figure 2020-2025 IBM Corporation Carbon Accounting Software Market Share

Table Sphera Information

Table SWOT Analysis of Sphera

Table 2020-2025 Sphera Carbon Accounting Software Revenue Gross Profit Margin

Figure 2020-2025 Sphera Carbon Accounting Software Revenue and Growth Rate

Figure 2020-2025 Sphera Carbon Accounting Software Market Share

Table Greenly Information

Table SWOT Analysis of Greenly

Table 2020-2025 Greenly Carbon Accounting Software Revenue Gross Profit Margin

Figure 2020-2025 Greenly Carbon Accounting Software Revenue and Growth Rate

Figure 2020-2025 Greenly Carbon Accounting Software Market Share

Table Diligent Corporation Information

Table SWOT Analysis of Diligent Corporation

Table 2020-2025 Diligent Corporation Carbon Accounting Software Revenue Gross Profit Margin

Figure 2020-2025 Diligent Corporation Carbon Accounting Software Revenue and Growth Rate

Figure 2020-2025 Diligent Corporation Carbon Accounting Software Market Share

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