

Carbon & Scope 3 Software

The 2026 Buyer's Guide & Vendor Landscape

A practitioner's guide to evaluating, costing, and selecting carbon accounting and supply chain sustainability software: what these systems do, how they measure Scope 3 emissions, how the market and vendors stack up in 2026, what they cost, how to run the selection, and how regulation is reshaping demand.

Prepared by **Supply Chain Research** · June 2026 · Vendor-neutral: we take no payment from the vendors covered.

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1. Executive summary

Carbon and Scope 3 software measures, manages, and reports a company's greenhouse-gas emissions across its operations and, above all, its supply chain. It spans carbon accounting against the Greenhouse Gas Protocol, Scope 3 measurement across purchased goods and logistics, product carbon footprinting, supplier emissions data collection, and the regulatory reporting that satisfies frameworks like the EU's CSRD and California's climate-disclosure laws. For years this was a voluntary sustainability exercise. Regulation has changed that, turning emissions measurement, and the supply chain emissions that dominate it, into a compliance and finance obligation. In 2026 the category is being reshaped by that regulatory wave, by AI applied to Scope 3 estimation and supplier data, and by a sharp wave of consolidation.

This guide is written for sustainability, finance, supply chain, and IT leaders evaluating a carbon software investment, and for the teams who must collect the data and file the reports. It is deliberately vendor-neutral: we accept no payment from the vendors covered, and we name no single best platform, because the right choice depends on your reporting obligations, your industry, whether financed emissions matter, and whether you need a dedicated carbon platform or an ERP-embedded module. The pages that follow define the category, size the market honestly while flagging a common conflation, profile the venture-backed, suite, and EHS-heritage tiers, lay out an evaluation framework, and explain why Scope 3 supplier-data quality, not the dashboard, decides the outcome.

~\$11-24B

range of 2025 estimates, a roughly 2x spread between narrow accounting and broad ESG management

Richly covered

a Gartner Market Guide, an IDC MarketScape, a Verdantix Green Quadrant, and Forrester all assess this market

11.4x

supply-chain (Scope 3) emissions average, relative to a company's operational emissions (CDP)

What the evidence says

Regulation is the defining driver. The EU's CSRD, California's SB 253 and SB 261, and the EU CBAM are pulling demand, and although all were narrowed or delayed in 2025 and 2026, their core Scope 3 obligations remain intact.

Scope 3 is the hard part, and the whole point. On average a company's supply-chain emissions are 11.4 times its operational emissions, so Scope 3 measurement, which depends on supplier data, is where these platforms earn their keep.

This category is unusually well covered by analysts. Gartner publishes a Market Guide, IDC a MarketScape naming Persefoni and Sphera Leaders, and Verdantix a Green Quadrant naming Watershed and Sweep Leaders, so buyers have real reference points.

Consolidation has redrawn the map. IBM acquired Envizi, Watershed acquired VitalMetrics, Sweep acquired Avarni, and the venture-backed leaders raised large rounds, so ownership and scope are shifting quickly.

Supplier-data quality is the make-or-break variable. Most of the effort and most of the risk sit in collecting credible Scope 3 data from suppliers, and roughly a tenth of suppliers typically account for more than half of Scope 3 emissions.

2. What carbon and Scope 3 software is

Carbon software measures and reports a company's greenhouse-gas emissions and helps reduce them, with the supply chain at the center because that is where most emissions sit. The core capabilities are:

- **Carbon accounting.** Measuring emissions across Scope 1 (direct), Scope 2 (purchased energy), and Scope 3 (value chain) in line with the Greenhouse Gas Protocol.
- **Scope 3 and supplier emissions.** Estimating and collecting value-chain emissions, especially from purchased goods and services, using emission factors, spend data, and supplier-specific data.
- **Product carbon footprinting.** Calculating the emissions of individual products across their life cycle, increasingly demanded by customers and regulators.
- **Logistics and transport emissions.** Quantifying the emissions of freight and distribution, a fast-growing use case as supply chains decarbonize.
- **Regulatory and ESG reporting.** Producing the disclosures required by frameworks such as the CSRD, California's climate laws, and voluntary standards.

Why Scope 3 is the center of gravity

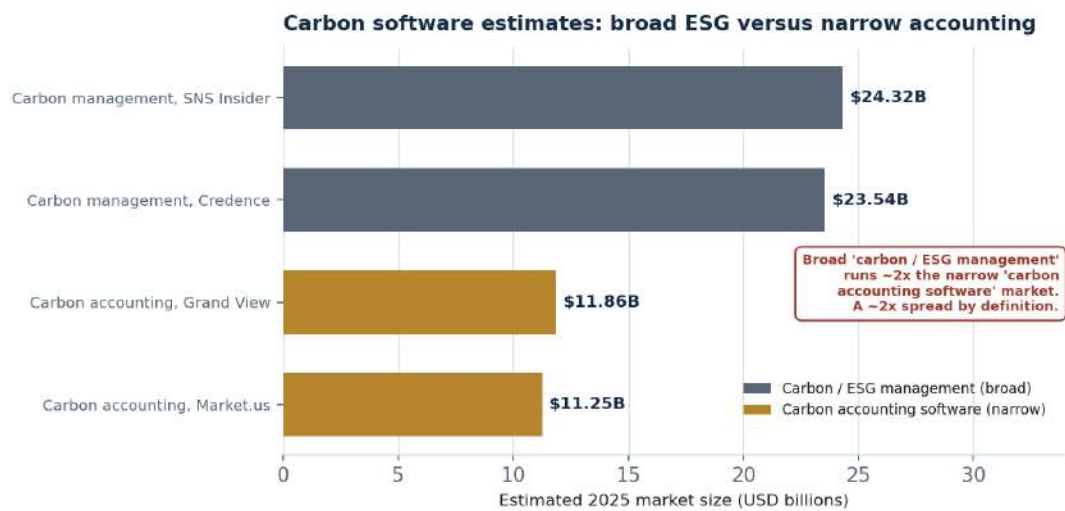
The single most important fact about carbon software is that Scope 3, the emissions in a company's value chain rather than its own operations, dominates the total. On average, supply-chain emissions are roughly 11.4 times a company's operational emissions, and purchased goods and services alone can be up to two-thirds of the footprint. That is why carbon software is, in practice, supply chain software: the hard problem is not adding up the fuel burned on site, which is straightforward, but measuring the emissions embedded in thousands of suppliers and products, which is not. The breadth and credibility of a platform's Scope 3 and supplier-data capability is therefore the heart of any evaluation.

Capability area	What it covers	Difficulty
Scope 1 and 2	Direct and purchased-energy emissions	Straightforward
Scope 3	Value-chain and supplier emissions	Hard, data-driven
Product footprint	Life-cycle emissions per product	Hard
Reporting	CSRD, California, voluntary frameworks	Moderate

Carbon software is distinct from the broader environment, health, and safety (EHS) software that some vendors grew from, and from the ESG-risk and supplier-risk tools covered elsewhere. It is increasingly embedded in ERP as well, where SAP, Microsoft, Oracle, and others provide sustainability modules, trading depth for a single platform and one integration.

3. The carbon software market in 2026

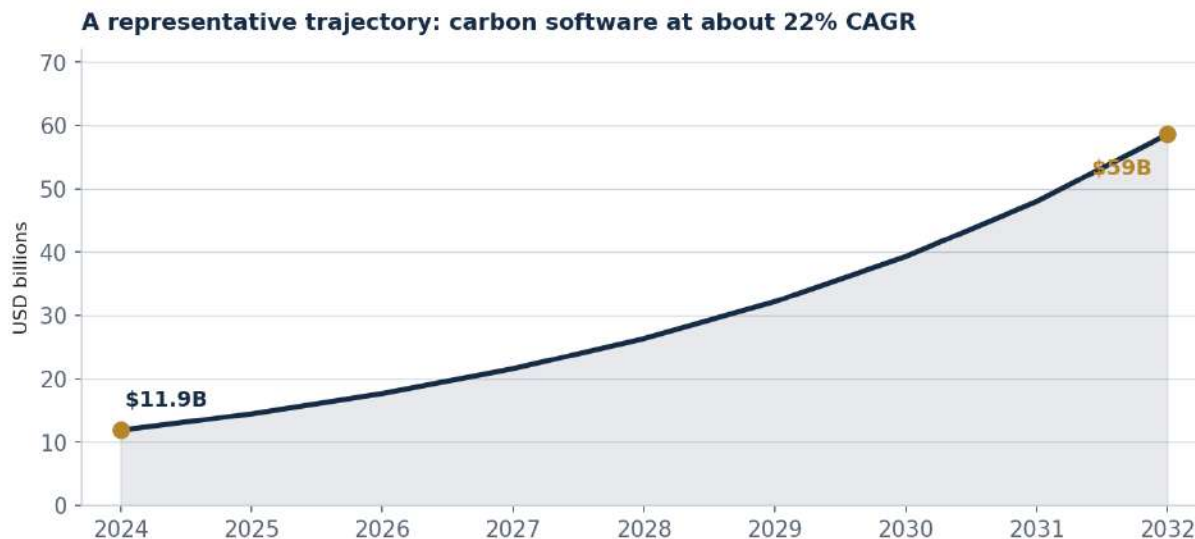
Carbon software is one of the largest and fastest-growing categories in this series, but its size depends entirely on where the boundary is drawn. The narrow carbon-accounting-software market is sized near \$11B to \$12B; the broader carbon and ESG management market is around \$23B to \$24B, roughly twice as large. Both are growing in the low-to-mid twenties percent. Treat the figures below as directional, and check what each one is counting.



Source: Supply Chain Research analysis of published 2025 estimates (Grand View 2024 base). Broad figures count carbon and ESG management; narrow figures count dedicated carbon accounting software.

Figure 1. Published 2025 estimates by definition. Broad carbon and ESG management runs roughly twice the narrow carbon accounting software market.

Source and definition	Size (2025)	Forecast	CAGR
SNS Insider (carbon management)	\$24.32B	\$191.21B / 2035	22.9%
Credence Research (carbon management)	\$23.54B	\$122.57B / 2032	26.6%
Grand View Research (carbon accounting)	\$11.86B	\$67.58B / 2033	22.1%
Market.us (carbon accounting)	\$11.25B	\$90.63B / 2035	23.2%



Source: Grand View Research (narrow carbon accounting, 22.1% CAGR). Regulation is accelerating near-term demand; transport and logistics is the fastest-growing vertical.

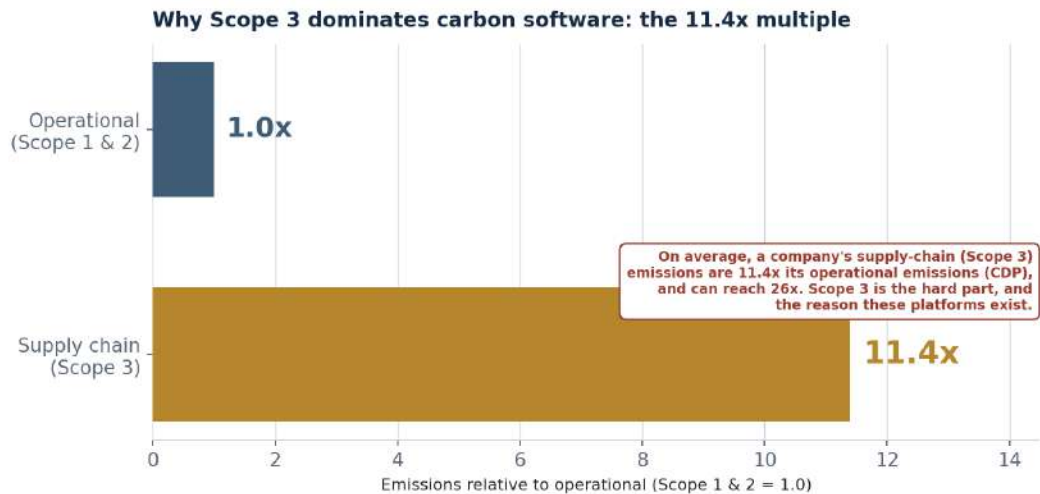
Figure 2. A representative trajectory for carbon software at about 22 percent CAGR (Grand View Research). Regulation is accelerating near-term demand.

Why the estimates diverge

The spread is mostly definition. The narrowest figures count dedicated carbon accounting software, while the broadest add carbon and ESG management more widely. Software makes up the core, cloud deployment dominates at roughly 67 to 73 percent, and North America leads at roughly 37 to 45 percent. Energy and utilities is the largest vertical, but transportation and logistics is the fastest-growing, as freight decarbonization pulls demand. For planning, the narrow carbon-accounting figures of around \$11B to \$12B in 2025, growing in the low-to-mid twenties, are the most consistent baseline for dedicated software.

Why Scope 3 drives the market

Underneath the sizing sits a single structural driver: the dominance of Scope 3. Because a company's supply-chain emissions average roughly 11.4 times its operational emissions, and can reach 26 times, measuring and reducing them is both the regulatory requirement and the commercial opportunity, illustrated in Figure 3. This is why the category is, at heart, about supplier data, and why demand has shifted from voluntary footprinting to mandatory value-chain accounting. The growth of regulation, examined below, has turned that structural driver into a deadline.



Source: CDP Global Supply Chain Report (supply-chain emissions average 11.4x operational; up to 26x in CDP and BCG 2024). Carbon Direct: purchased goods and services can be up to 67% of total footprint.

Figure 3. The Scope 3 multiple (CDP). Supply-chain emissions dwarf operational emissions, which is why Scope 3 measurement defines the category.

4. The vendor landscape

The carbon software market spans venture-backed carbon platforms, ERP and platform suites, and vendors with an EHS or industrial heritage, and it has consolidated quickly. We group vendors into four tiers by what they do best, not by size. No vendor leads every tier, and recent funding and acquisitions have redrawn the map.

What the analysts say

This is the best-covered category in this series, and buyers have real reference points. The essentials:

- **Gartner publishes a Market Guide.** The Gartner Market Guide for Carbon Accounting and Management Software, published in October 2025, defines the market against the Greenhouse Gas Protocol and notes rapid generative-AI adoption alongside persistent source-data quality gaps.
- **IDC and Verdantix rank the vendors.** The IDC MarketScope names Persefoni and Sphera as Leaders, and the Verdantix Green Quadrant for Enterprise Carbon Management Software 2026 names Watershed and Sweep as Leaders, giving two independent vendor evaluations.
- **Forrester adds a third view.** Forrester named Persefoni a leader in sustainability management software, so the analyst picture, unusually for this series, is rich rather than thin.

Carbon and Scope 3 software landscape, 2026



Gartner publishes a Market Guide (Oct 2025, representative vendors, no quadrant ranking). IDC MarketScope names Persefoni and Sphera Leaders; Verdantix 2026 names Watershed and Sweep Leaders. SCR interpretation, not analyst coordinates.

Figure 4. Supply Chain Research's directional map. Gartner publishes a Market Guide rather than a ranked quadrant; these positions are our interpretation, informed by IDC and Verdantix, not analyst coordinates.

Venture-backed carbon platforms

These vendors are dedicated carbon platforms built in the last several years and backed by significant funding. Watershed, founded in 2019, raised a \$100 million round in 2024 at a \$1.8 billion valuation and acquired the carbon-data firm VitalMetrics, and serves customers including Walmart and BlackRock. Persefoni, founded in 2020, focuses on financed emissions for financial services through the PCAF standard,

raised successive rounds, and reports thousands of organizations on its platform. Sweep, Normative, Greenly, Plan A, Sinai, and Climatiq round out the field. Strengths: depth on carbon and Scope 3, modern user experience, and large emission-factor libraries. Limitations: most are young companies, and breadth beyond carbon varies.

ERP and platform suites

These vendors embed sustainability in a broader enterprise platform. SAP offers Sustainability Footprint Management and a Green Ledger, Microsoft provides a Sustainability Cloud, Salesforce a Net Zero Cloud, IBM acquired Envizi, and Oracle offers sustainability capabilities. Strengths: integration with the systems that hold the underlying business data, and enterprise scale. Limitations: carbon depth can lag the dedicated platforms, and value is greatest for companies already standardized on that suite.

EHS heritage and specialists

Two further groups complete the picture. Vendors with an environment, health, and safety or industrial heritage, Sphera, Enablon, Cority, Intellex, and Workiva, bring deep regulatory and reporting pedigree, with Sphera named an IDC Leader and Workiva strong on integrated ESG and financial reporting. And SMB and mid-market specialists, Greenly, Plan A, Sinai, and Climatiq, serve smaller companies with lighter, faster tools. Strengths: regulatory depth and accessibility respectively. Limitations: EHS tools can feel heavier than the modern carbon platforms, and SMB tools are narrower in scope.

Vendor summary

Vendor	Tier	Best fit	Notes
Watershed	VC-backed platform	Enterprise carbon and Scope 3	\$1.8B valuation; acquired VitalMetrics
Persefoni	VC-backed platform	Financed emissions, finance	PCAF focus; IDC MarketScape Leader
Sweep / Normative	VC-backed platform	Carbon and value-chain data	Sweep a Verdantix 2026 Leader
SAP / Microsoft / Oracle	ERP and platform suites	ERP-standardized firms	Sustainability within the suite
IBM Envizi / Salesforce	Platform suites	Enterprise reporting	IBM acquired Envizi
Sphera / Cority / Enablon	EHS heritage	Regulatory and industrial	Sphera an IDC MarketScape Leader
Workiva	Reporting	Integrated ESG and financial	Assurance-grade disclosure
Greenly / Plan A / Climatiq	SMB and mid-market	Smaller companies	Lighter, faster deployment

Positions and notes are Supply Chain Research's interpretation from public information, the Gartner Market Guide, the IDC MarketScape, and the Verdantix Green Quadrant, current to mid-2026. Ownership and scope change quickly; verify current details directly with each vendor.

5. How to evaluate a carbon platform

The differentiators in carbon software are Scope 3 and supplier-data capability, regulatory coverage, and the credibility of the data, more than the headline feature list. We use five dimensions.

The five evaluation dimensions

1. **Scope 3 and supplier data.** How comprehensive is the platform's emission-factor library, and how well does it estimate and collect value-chain emissions, including engaging suppliers for primary data? This is the core test.
2. **Regulatory coverage.** Does it support the frameworks you must report under, the CSRD, California's laws, CBAM, and voluntary standards, with the audit trail that assurance demands?
3. **Data quality and assurance.** How credible, auditable, and assurance-ready is the output, given that disclosures are increasingly subject to external verification and legal scrutiny?
4. **Integration.** How cleanly does it connect to the ERP, procurement, and logistics systems that hold the underlying activity data, the link that determines whether measurement is automated or manual?
5. **AI, usability, and viability.** Assess AI for Scope 3 estimation, the user experience, and the vendor's stability in a consolidating, fast-funded market.

Making the decision

Match the platform to your obligations and profile. Large enterprises with complex value chains and assurance requirements reward the dedicated platforms such as Watershed and Persefoni and the EHS-heritage vendors such as Sphera. Financial institutions with financed emissions reward Persefoni's PCAF focus. Companies standardized on a major ERP may reward its embedded sustainability module, and smaller companies reward the lighter SMB tools. Then validate Scope 3 and regulatory coverage against your actual reporting requirements.

A selection process that works

6. Define your reporting obligations, the frameworks and deadlines you must meet, and your industry profile.
7. Decide between a dedicated carbon platform, an ERP-embedded module, and an EHS-heritage tool, and shortlist accordingly.
8. Test Scope 3 and supplier-data capability against your real value chain, not a demonstration dataset.
9. Probe ERP, procurement, and logistics integration early, with real activity data.
10. Assess AI capability, assurance-readiness, and vendor stability, and check references in your industry.

6. Cost and pricing

Carbon software pricing scales with company size, the scopes and frameworks covered, and the depth of supplier engagement, and implementation and consulting are usually separate. The models you will encounter:

Pricing tier	Typical basis	Notes
SMB tools	Low annual fee	A few thousand dollars per year
Mid-market	Subscription	Roughly \$20K to \$100K per year
Enterprise platform	Subscription, scaled	\$100K into the millions for global rollouts
Implementation and consulting	Project fee	Data setup, factor mapping, assurance support
Supplier engagement	Often add-on	Collecting primary data from suppliers

What drives the number

Company size, the scopes and frameworks in scope, and the depth of supplier engagement are the main cost drivers, and the largest implementation effort is setting up the data, mapping emission factors, and connecting source systems. Enterprise rollouts that span Scope 3 and multiple regulatory frameworks reach well into six and seven figures, while SMB tools cost a few thousand dollars a year. A common mistake is under-scoping the supplier-data work, then discovering that credible Scope 3 reporting requires far more engagement than the base subscription assumed. Model the full cost, including consulting and supplier engagement, not the platform fee alone.

Enterprise carbon pricing is typically gated behind a sales process and a scoping exercise, so published figures should be treated as starting points. Build a data-readiness assessment and a reference check into the buying process to validate both cost and the reporting and reduction benefits the vendor projects.

7. Implementation: where programs succeed or fail

Carbon software programs fail in predictable ways, and almost none of the failure modes are about the user interface. They are about data, suppliers, and assurance. The recurring causes:

- **Scope 3 supplier data is weak.** If supplier emissions data is incomplete or estimated too crudely, the largest part of the footprint is unreliable, and the report cannot withstand scrutiny.
- **Source-system integration is underestimated.** The activity data that drives emissions sits in ERP, procurement, and logistics systems, and connecting it cleanly is harder than the implementation plan assumes.
- **Assurance-readiness is an afterthought.** Disclosures are increasingly externally verified and legally scrutinized, so an audit trail and methodology that were not built for assurance fail late and expensively.
- **Regulatory scope is misjudged.** Misreading which frameworks and deadlines apply, in a fast-moving regulatory environment, leads to either over-building or missing an obligation.

Supplier data credible Scope 3 supplier data is the precondition for a defensible footprint	Integration clean ERP and procurement links turn measurement from manual to automated	Assurance an audit trail built in from the start is what survives external verification
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Three principles that separate success from failure

Engage suppliers early. Begin collecting primary Scope 3 data from your most material suppliers from the start, because roughly a tenth of suppliers drive more than half of Scope 3 emissions and that is where the effort pays off.

Build for assurance. Treat the audit trail and methodology as assurance-grade from day one, because external verification and legal scrutiny are now the norm, not the exception.

Track the regulation deliberately. Confirm which frameworks and deadlines actually apply and design to them, because the regulatory landscape is fluid and both over-building and missing an obligation are costly.

A phased rollout

Sequence the program to retire risk early. Begin with Scope 1 and 2, which are straightforward, and a first pass at Scope 3 using spend-based estimates, establishing the data pipeline and the reporting baseline. Then deepen Scope 3 with supplier-specific data for the most material categories, connect source systems, and extend to product footprinting and additional frameworks. Treating these as sequential stages, rather than a single switch, is what separates a smooth rollout from a stalled one.

8. Trends shaping 2026

Regulation, narrowed but not abandoned

The dominant trend is regulation, and in 2025 and 2026 it was simplified rather than reversed. The EU's CSRD was narrowed through an Omnibus package, the reporting timetable was delayed, and the detailed datapoints were cut sharply, but the core obligation to report value-chain emissions remains. The practical message for buyers is that the deadlines moved and the scope tightened, yet the need for credible Scope 3 accounting did not go away.

California and CBAM

Two further regimes shape demand. California's climate-disclosure laws require large companies to report emissions including Scope 3, with rules being finalized and deadlines adjusted through 2026, while one of the laws faced legal challenge. And the EU's Carbon Border Adjustment Mechanism entered its definitive phase in 2026, putting a price on the embedded emissions of certain imports and pulling product-level carbon data into trade. Together they extend the regulatory driver well beyond the EU's core reporting rules.

AI for Scope 3 estimation

AI is being applied to the hardest part of the problem: estimating Scope 3 emissions and automating supplier-data collection, including reading invoices and mapping spend to emission factors. As Gartner notes, generative-AI adoption is rapid even as source-data quality remains the persistent constraint, so AI is easing the effort without removing the need for credible underlying data.

Transport and logistics decarbonization

Transportation and logistics is the fastest-growing vertical for carbon software, as shippers quantify and reduce freight emissions and customers demand shipment-level carbon data. This pulls carbon measurement directly into supply chain and logistics decisions, rather than leaving it in a separate sustainability function.

Consolidation and convergence

The market is consolidating, with IBM, Watershed, Sweep, and others acquiring data and capability, and it is converging with adjacent categories: supplier-collaboration networks are becoming the channel for Scope 3 data, and spend-analytics tools are adding emissions analytics. As across supply chain software, agentic AI is an emerging frontier, and buyers should weigh demonstrated capability over roadmap promises.

9. Segment-specific guidance

The right approach depends on your obligations and size. The table summarizes where each segment usually starts; the prose adds the nuance.

Buyer profile	What matters most	Where to start
Large enterprise	Scope 3 depth, assurance, scale	Watershed, Persefoni, Sphera
Financial institution	Financed emissions (PCAF)	Persefoni
ERP-standardized firm	Integration, one platform	SAP, Microsoft, Oracle, IBM Envizi
Industrial / EHS-heavy	Regulatory and operational depth	Sphera, Cority, Enablon
SMB / mid-market	Speed and simplicity	Greenly, Plan A, Normative

Large enterprises with complex value chains and assurance needs reward the dedicated platforms and EHS-heritage vendors. **Financial institutions** need financed-emissions accounting, the specific strength of Persefoni. **ERP-standardized firms** may reward an embedded sustainability module for the single platform and integration. **Industrial and EHS-heavy companies** reward the regulatory and operational depth of the EHS-heritage vendors, and **smaller companies** reward the lighter, faster SMB tools. The unifying rule is to match the platform to the reporting obligation and the complexity of the value chain.

10. ROI and the business case

The business case for carbon software has two halves: compliance, which is increasingly non-negotiable, and value, from efficiency and commercial advantage. The levers are avoided regulatory and reputational risk, faster and cheaper reporting, identified emissions-reduction and cost-saving opportunities, and the commercial value of credible sustainability claims. The discipline is refusing to bank the vendor's headline figure before testing it against your own reporting burden.

Compliance credible reporting avoids regulatory penalty and reputational damage	Efficiency automation cuts the cost and time of measurement and disclosure	Reduction identified hotspots drive emissions cuts that often cut cost too
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Where the value comes from

Most of the return comes from a few places, and regulation has sharpened the first. Compliance is the headline lever: as the CSRD, California's laws, and CBAM take effect, credible carbon accounting moves from optional to required, and the cost of getting it wrong, in penalties and reputation, is rising. Efficiency follows, with one source citing reporting cycles up to 40 percent faster after adoption, a figure that is vendor and analyst sourced and should be treated as directional. Beyond compliance, measuring Scope 3 surfaces the emissions and cost hotspots concentrated in a small share of suppliers, which is where reduction, and often cost saving, is found, and credible sustainability data carries growing commercial value with customers and investors. The business case is strongest where regulatory exposure is largest, but the savings should be modeled on your own reporting burden and supplier base, with vendor figures used only to size the opportunity.

11. Frequently asked questions

What is carbon and Scope 3 software?

Software that measures, manages, and reports a company's greenhouse-gas emissions across Scope 1 (direct), Scope 2 (purchased energy), and Scope 3 (value chain), along with product footprinting and regulatory reporting. Because the supply chain dominates the total, it is in practice supply chain software focused on emissions.

Why does Scope 3 matter so much?

Because it dominates. On average, a company's supply-chain (Scope 3) emissions are roughly 11.4 times its operational emissions, and purchased goods and services alone can be up to two-thirds of the footprint. Measuring Scope 3, which depends on supplier data, is the hard problem these platforms exist to solve.

Is there a Gartner Magic Quadrant for carbon software?

Gartner publishes a Market Guide for Carbon Accounting and Management Software rather than a ranked Magic Quadrant. The category is unusually well covered overall: IDC publishes a MarketScape naming Persefoni and Sphera Leaders, and Verdantix a Green Quadrant naming Watershed and Sweep Leaders.

Who are the leading vendors?

It depends on the tier. Venture-backed platforms include Watershed, Persefoni, Sweep, and Normative; ERP and platform suites include SAP, Microsoft, Oracle, IBM Envizi, and Salesforce; and EHS-heritage vendors include Sphera, Cority, Enablon, and Workiva. SMB and mid-market tools include Greenly, Plan A, and Climatiq.

How big is the market?

Estimates range from roughly \$11B to \$24B in 2025, a two-fold spread. The narrow carbon-accounting-software market is around \$11B to \$12B, while the broader carbon and ESG management market is around \$23B to \$24B. Both are growing in the low-to-mid twenties percent, with the narrow figures the most consistent baseline.

What regulations are driving demand?

Chiefly the EU's CSRD, California's SB 253 and SB 261, and the EU's Carbon Border Adjustment Mechanism. All were narrowed or delayed in 2025 and 2026, with scope tightened and deadlines moved, but their core requirement to account for value-chain emissions remains intact, which sustains demand.

What does it cost?

Pricing scales with company size and scope. SMB tools cost a few thousand dollars a year, mid-market platforms roughly \$20K to \$100K, and enterprise platforms from \$100K into the millions for global rollouts, with implementation and supplier engagement usually separate. The largest effort is setting up data and collecting supplier emissions.

Should I buy a dedicated platform or an ERP module?

It depends. Large enterprises with complex value chains and assurance needs often reward a dedicated platform such as Watershed or Persefoni; companies standardized on a major ERP may reward its embedded sustainability module for the integration and single platform. The first scoping decision is which fits your obligations.

How is AI changing carbon software?

AI is being applied to estimate Scope 3 emissions and automate supplier-data collection, including reading invoices and mapping spend to emission factors. Generative-AI adoption is rapid, but source-data quality remains the persistent constraint, so AI eases the effort without removing the need for credible underlying data.

What is the most common reason these programs fail?

Weak Scope 3 supplier data, underestimated source-system integration, assurance-readiness treated as an afterthought, and misjudged regulatory scope. Almost none of the common failures are about the dashboard. Engaging suppliers early and building for assurance from the start are the most important steps.

12. Recommendations

A practical path for buyers, drawn from the analysis above:

- 11. Treat compliance as the floor and value as the upside.** Regulation justifies the investment, but build the business case on reporting efficiency, reduction opportunities, and commercial value as well, not on compliance alone.
- 12. Use the rich analyst coverage.** Lean on the Gartner Market Guide, the IDC MarketScape, the Verdantix Green Quadrant, and references in your industry, which together give this category unusually strong reference points.
- 13. Make Scope 3 and supplier data the first test.** Because Scope 3 dominates the footprint, judge platforms first on their emission-factor library and their ability to estimate and collect value-chain data.
- 14. Decide dedicated platform versus ERP module deliberately.** Weigh the carbon depth of a dedicated platform against the integration value of an embedded module, based on your obligations and existing systems.
- 15. Build for assurance and track the regulation.** Treat the audit trail as assurance-grade from day one, and confirm which frameworks and deadlines actually apply in a fast-moving regulatory environment.
- 16. Treat ROI claims as a ceiling.** Model reporting efficiency and reduction on your own burden and supplier base, and watch the consolidating vendor map as ownership shifts.

13. Methodology and caveats

- This guide synthesizes public market-research estimates, the Gartner Market Guide for Carbon Accounting and Management Software, the IDC MarketScape, the Verdantix Green Quadrant, vendor disclosures, and regulatory sources, current to mid-2026. Supply Chain Research is independent and accepts no payment from the vendors covered.
- Market-size figures diverge by roughly two times by definition, between narrow carbon accounting software (around \$11B to \$12B in 2025) and broad carbon and ESG management (around \$23B to \$24B). We present a range and treat the narrow figures as the most consistent baseline. Several sources are SEO-style market-research firms and are directional only.
- This category is well covered by analysts, but Gartner publishes a Market Guide with representative vendors rather than a ranked quadrant. The landscape map in Figure 4 is our directional interpretation, informed by the IDC and Verdantix evaluations, not analyst coordinates.
- The Scope 3 multiple in Figure 3 is drawn from the CDP Global Supply Chain Report (supply-chain emissions average 11.4 times operational, up to 26 times in later analysis). Reporting-efficiency and ROI figures are vendor or analyst sourced and treated as a ceiling.
- The regulatory landscape is fluid: the CSRD Omnibus, California's SB 253 and SB 261, and the EU CBAM all changed through 2025 and 2026, with scope narrowed and deadlines moved. Treat all regulatory dates as point-in-time and verify current status directly before relying on them.

14. Sources

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