

## **Carbon Management System - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-06-01 | 130 pages | Mordor Intelligence

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### **Report description:**

Carbon Management System Market Analysis

The carbon management system market size is valued at USD 16.11 billion in 2025 and is forecast to reach USD 32.50 billion by 2030, expanding at a 15.07% CAGR. This trajectory reflects the strategic convergence of regulatory mandates, enterprise net-zero commitments, and rapid advances in AI-enabled data analytics that are transforming emissions tracking from a discretionary activity into a core business function. Heightened scrutiny from the SEC climate-risk rules in the United States and the Corporate Sustainability Reporting Directive in the European Union is compelling companies to adopt audit-grade carbon accounting platforms that integrate directly with ERP, procurement, and energy-management systems. Large corporates remain the principal buyers, yet adoption is accelerating among small and medium enterprises thanks to simplified SaaS offerings and green-finance incentives. Cloud deployment dominates because it delivers the scalability and interoperability needed to ingest granular Scope 3 data from suppliers in real time. Competitive intensity is rising as established software vendors embed carbon modules into existing product suites while specialists differentiate through sector-specific analytics and tokenized-credit capabilities. Near-term market opportunity is underpinned by the fact that only 10% of companies presently measure greenhouse-gas emissions comprehensively, creating a sizeable technology-replacement cycle.

Global Carbon Management System Market Trends and Insights

Stricter Carbon-Disclosure Regulations Drive Systematic Adoption

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The 2024 SEC climate-risk rules oblige public companies to disclose Scope 1 and 2 emissions in filings, creating a de facto compliance requirement for audit-ready carbon accounting systems. Simultaneously, the EU CSRD will compel roughly 50,000 companies to begin reporting Scope 3 data in 2025, with significant fines for non-compliance. Australia, Japan, and Canada are introducing analogous frameworks that extend obligations down the supply chain, prompting proactive investments in carbon-management technology even among suppliers that are not directly regulated. Collectively, these regulations remove any residual ambiguity over whether emissions data must be captured to financial-statement standards and transform the carbon management system market into a mandatory software category.

#### Corporate Net-Zero Commitments Accelerate Platform Integration

More than 1,000 multinationals have adopted science-based targets that require year-on-year progress toward 1.5 C pathways. Cardinal Health, for example, cut Scope 1 and 2 emissions 17% by fiscal 2024 after integrating carbon software with its enterprise data warehouse. Similar commitments by Novo Nordisk and GE HealthCare illustrate how emissions platforms are linked directly to procurement, logistics, and R&D planning to inform strategic decarbonisation roadmaps. These enterprise-wide programmes reinforce demand for solutions that can connect operational and financial data, support scenario modelling, and generate investor-grade disclosures.

#### High Implementation Costs Create SME Adoption Barriers

Typical licence fees for enterprise-grade carbon software range from the low-five to mid-six figures annually, placing them out of reach for many SMEs. Limited in-house expertise and fragmented data further elevate consulting costs. Green-finance instruments can defray expenses, yet uptake remains modest in emerging markets where credit access is constrained. Vendors are responding with modular, pay-as-you-grow offerings, but the near-term growth of the carbon management system market among smaller firms will remain sensitive to price.

Other drivers and restraints analyzed in the detailed report include:

Cost Savings From Energy-Efficiency and Cloud Migration / AI-Driven Scope 3 Data Harmonisation Unlocks ESG Finance / Data Standardisation Challenges Impede Cross-Platform Integration /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Software accounted for 75% of 2024 revenue as enterprises sought end-to-end platforms that combine data ingestion, carbon accounting, and predictive analytics in a single interface. The carbon management system market size attributed to software is forecast to rise from USD 12.1 billion in 2025 to USD 23.9 billion by 2030. Continuous emissions monitoring and real-time dashboards enable management teams to link abatement actions directly to financial outcomes, reinforcing the software's strategic importance.

Services revenue is increasing at a 15.2% CAGR as organisations grapple with Scope 3 data-collection complexity and regulatory mapping. Advisory firms embed industry-specific factors and design change-management programmes that accelerate user adoption. Over the forecast period, integrated software-plus-services bundles are expected to represent the dominant procurement model within the carbon management system market.

Cloud solutions captured 68% of 2024 spending, reflecting IT-budget preference for OpEx-based subscriptions and the need for near-infinite scalability to process granular supply-chain data. The carbon management system market share for cloud is forecast

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to reach 74% by 2030, supported by hyperscaler partnerships that provide secure, regionally compliant data-residency options.

On-premise platforms persist among highly regulated sectors, including defence and utilities, where data-sovereignty rules prevail. Hybrid architectures are gaining traction, allowing sensitive data to remain behind the firewall while leveraging cloud analytics for global reporting. Vendors are investing heavily in zero-trust architectures to counter rising cyber-risk associated with ESG disclosures.

The Carbon Management System Market is Segmented by Offering (Software, Services), Deployment Mode (Cloud-Based, On-Premise), Application (Energy, Greenhouse Gas Management, Air Quality Management, and More), End-User Industry (Oil and Gas, Manufacturing, Healthcare, and More), Organization Size (Large Enterprises, Small and Medium Enterprises), and by Geography. The Market Forecasts are Provided in Terms of Value (USD).

### Geography Analysis

North America topped the revenue league table with a 41% share in 2024, buoyed by the SEC disclosure rule and a mature ecosystem of ESG-savvy investors. The US Department of Energy's multi-billion-dollar carbon-capture programme further stimulates platform demand by requiring award recipients to demonstrate transparent measurement and verification. Canada's federal carbon-pricing regime encourages cross-border companies to standardise data collection in anticipation of border-adjustment taxes.

The carbon management system market is expanding fastest in APAC at a 16.9% CAGR. China's national emissions-trading scheme now covers the power sector and is expected to include cement and steel, creating an urgent need for automated allowance reconciliation. Japan's Green Transformation Act mandates corporate disclosures that mirror CSRD requirements, while regional suppliers face scope-down pressure from multinational buyers.

Europe remains an innovation hub thanks to the CSRD, but short-term growth is moderated by implementation deferrals granted through the 2025 Omnibus Package. Even with the two-year reprieve, firms employing more than 1,000 staff must still prepare audited sustainability statements, sustaining steady demand for carbon management software.

### List of Companies Covered in this Report:

IBM Corporation / SAP SE / ENGIE Impact / Simble Solutions Ltd / GreenStep Solutions Inc. / Microsoft Corporation / Schneider Electric SE / Salesforce.com Inc. / Greenstone + Ltd / Sphera Solutions / Enablon SA (Wolters Kluwer) / IsoMetrix / Persefoni AI / Watershed Technology Inc. / Plan A / Net0 / Sinai Technologies Inc. / Workiva Inc. / Brightly Software / Terrascope Pte Ltd / Carbmee GmbH / Diligent Corporation / Emitwise / Sweep SAS / Greenly /

### Additional Benefits:

The market estimate (ME) sheet in Excel format /  
3 months of analyst support /

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