Scope 3 Tools

Intelligence Report

2026

We hope to bring clarity to a **messy market**

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The Scope 3 tools market has grown quickly, but not always clearly. In recent years, we've seen an explosion of platforms, capabilities and claims, all aiming to help organisations measure and reduce value chain emissions. Yet for most practitioners, the reality remains complex and fragmented. Buyers are navigating a crowded landscape with no clear leader. Suppliers are being asked to engage across multiple systems. And solution providers are working to meet a rapidly evolving – and not always well-defined – set of expectations.

This complexity is exactly why we have produced this report.

The **Scope 3 Peer Group** exists to bring practitioners together to share what is actually working, what is not, and what needs to change. This Tools Review Intelligence Report builds on that mission. By bringing together the perspectives of buyers, suppliers and solution providers, it provides a clear, experience-led view of the market – grounded not in marketing claims, but in real-world use.

Our aim is simple: **For buyers**, this report should make it easier to navigate the market, learn from peers, and make better decisions about the tools that underpin their programmes. **For solutions providers**, it offers honest insight into where expectations are not being met, and where opportunities lie to deliver meaningful value.

Scope 3 is, by definition, a shared challenge – spanning organisations, supply chains and industries. Today, the market remains fragmented, the gap between promise and delivery is still too wide, and too much effort is spent navigating systems rather than driving emissions reductions.

But there is also real progress. The level of engagement and openness across the Peer Group gives confidence that the market will mature, and that the next generation of solutions will better reflect what practitioners actually need.

A big thanks to everyone who contributed to this work. Your openness is what allows the entire ecosystem to move forward.

If this report helps organisations find the right solutions faster – and helps providers build better ones – then it will have done its job. Because ultimately, improving this market is not just about tools; it's about enabling the coordinated action needed to tackle the biggest climate challenge of our time.

The **most comprehensive** intelligence of its kind

This report synthesises findings from the **Scope 3 Peer Group**'s 2025-26 Tools Review, the most comprehensive survey of Scope 3 digital tool usage conducted to date, as well as other intelligence gathered from the Scope 3 Peer Group in 2025 and 2026.

It draws on quantitative survey data alongside open-ended qualitative responses from three groups:

- enterprise buyers who procure and use Scope 3 tools
- suppliers asked by their customers to use those tools
- the solution providers who build them

All data was collected during Q4 2025 by the Scope 3 Peer Group. Respondents include practitioners from **Dell**, **Sony**, **Nestlé**, **Siemens**, **Amazon**, **Pfizer**, **Henkel**, Bayer, PepsiCo and many more.

The report is written for two audiences. **Buyers** will find market intelligence, peer lessons and a practical question framework for evaluating solutions. **Solution providers** will find honest insight into what buyers actually want, where perception gaps lie, and what practitioners say is missing.

The market context

Scope 3 tooling continues to grow but remains immature. Buyers are more price-sensitive than last year, no single platform has consolidated the market, and the gap between what tools promise and what they deliver remains the category's defining problem.

We are starting to see major consolidations and partnerships (as per the Scope3Navigator market tracker) and expect this to continue as the market matures.

255
respondents

58
suppliers

128
buyers

69
solutions providers

Five things that stand out from the data

1

The market is highly fragmented

Buyers average 2.7 tools to address scope 3 – and no provider holds more than 16% share among unique organisations.

Spreadsheets and custom portals remain the most common tools suppliers are asked to use by their customers.

2

Buyers are incredibly active

43% of buyers are actively looking for a new or replacement tool – up from 35% this time last year.

A significant proportion expect to decide within 12 months.

3

Price has sharply increased as a factor

54% of buyers cited cost as the top reason for rejecting a shortlisted vendor, up from 35% the year prior.

Scope 3 teams are small, underfunded, and increasingly unwilling to pay for tools that overpromise.

4

The challenges to progress are as much organisational, as they are technical

Data quality, supplier engagement, internal alignment and realistic scoping determine programme success – and none of these are solved by a software purchase.

5

The expectation/promise gap is a genuine challenge to the sector

Providers consistently claim capabilities that buyers report are missing or thin in practice.

A fragmented market with **no dominant player**

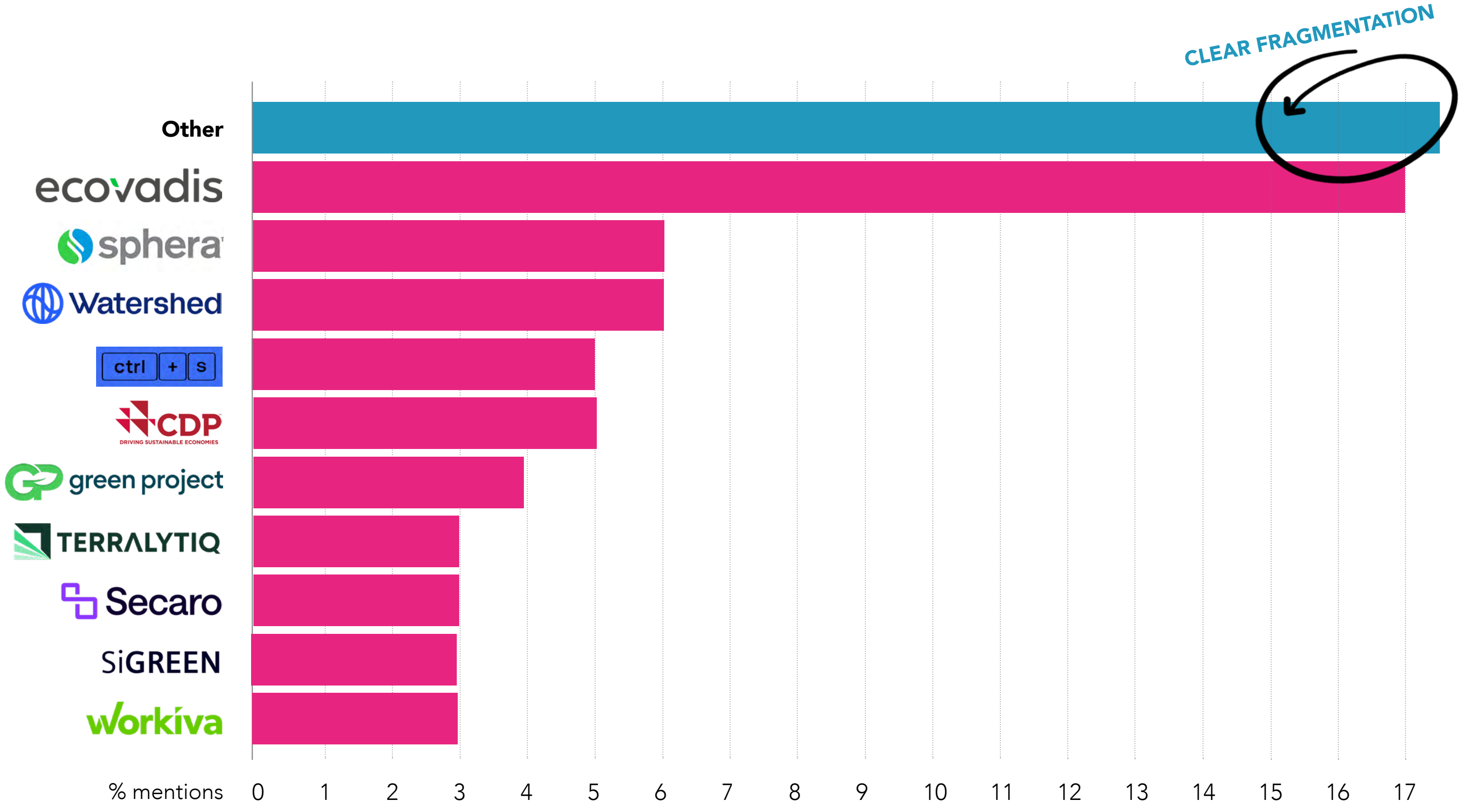
The Scope 3 tools market is large, crowded and still consolidating.

Within the Peer Group alone, **48 different tools** were named by buyers and 39 by suppliers. The single most-used tool by buyers – measured by unique organisations – accounts for just 16% of respondents.

For buyers, this fragmentation creates real costs:

- integration overhead
- inconsistent data formats
- the burden of managing multiple vendor relationships.

For solution providers, it means **no company is yet winning the market**. The opportunity remains open, but so does the competitive pressure.



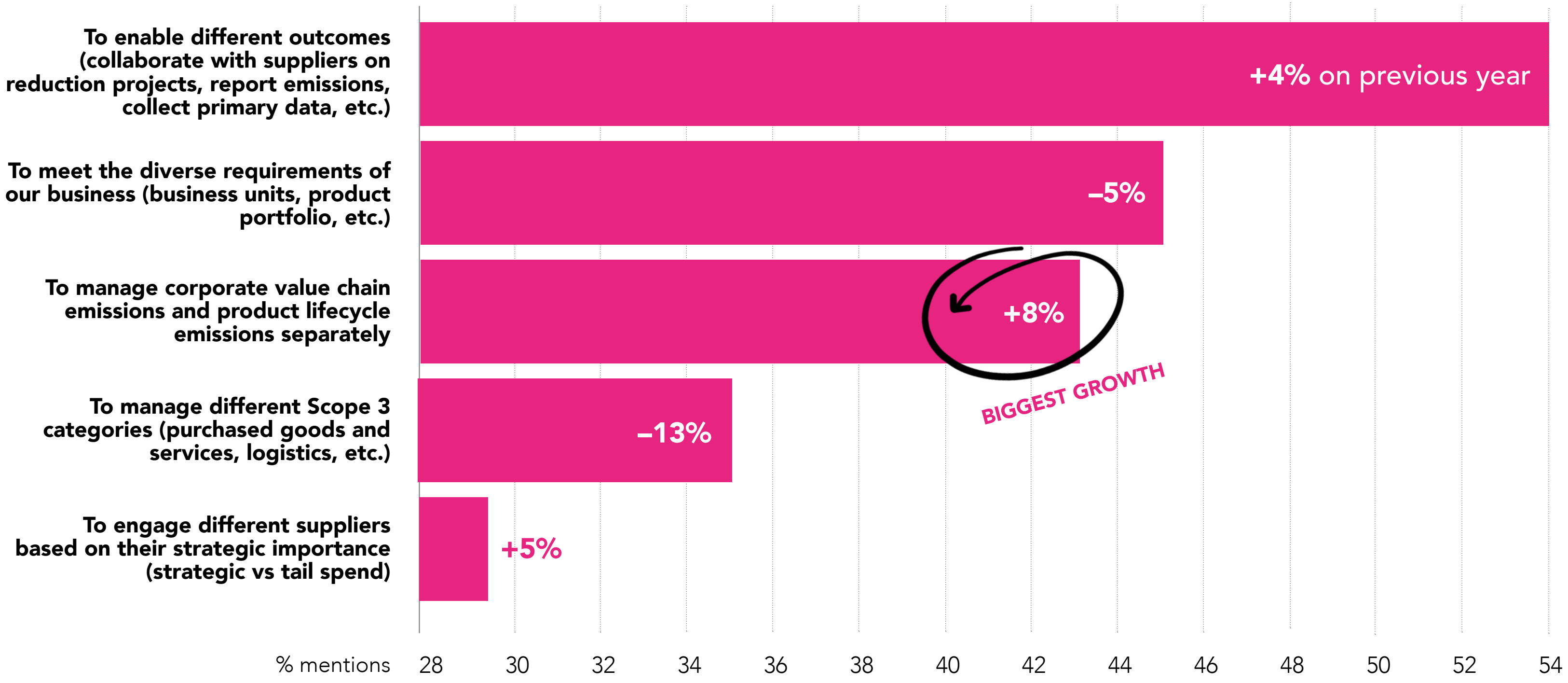
The average buyer now uses **2.7 tools**

The number of tools used per respondent has risen from 2.4 to **2.7** year-on-year. The most common reasons for using multiple tools are:

- to enable different outcomes (reporting, primary data collection, supplier collaboration) (54%)
- to meet diverse business requirements (45%)
- to manage corporate and product lifecycle emissions separately (43% – up from 35%)

This multi-tool reality reflects a core market truth: no single platform does everything well. Buyers are assembling best-of-breed stacks, **not buying comprehensive suites**. For suppliers, this compounds the fragmentation problem; they are asked to submit data into more and more systems that are not interoperable.

Why are you using (or expecting to use) multiple digital solutions to support your Scope 3 program?

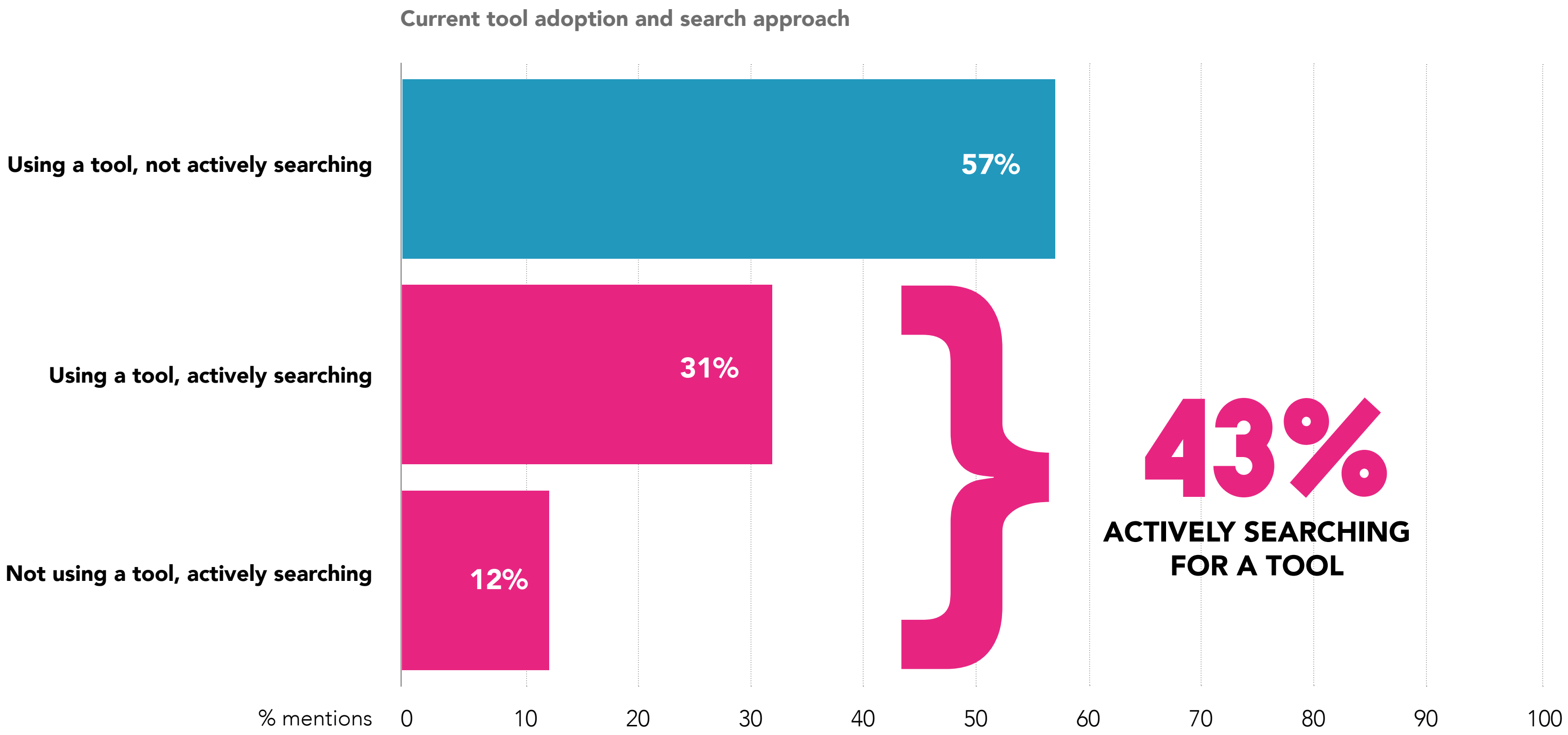


Buyers are actively searching – and market is re-evaluating

31% of buyers are using a tool but actively searching for a replacement.

Another 12% have no tool but are actively looking. Together, **43% are in active search mode**. This proportion was 55% in 2025, suggesting some consolidation, but a large portion of the market remains in flux.

A notable trend: many companies are going back to market to re-evaluate and optimise their tech stack, not just buy for the first time. This re-evaluation wave is an opportunity for providers who can demonstrate genuine progress on the pain points that drove dissatisfaction initially.



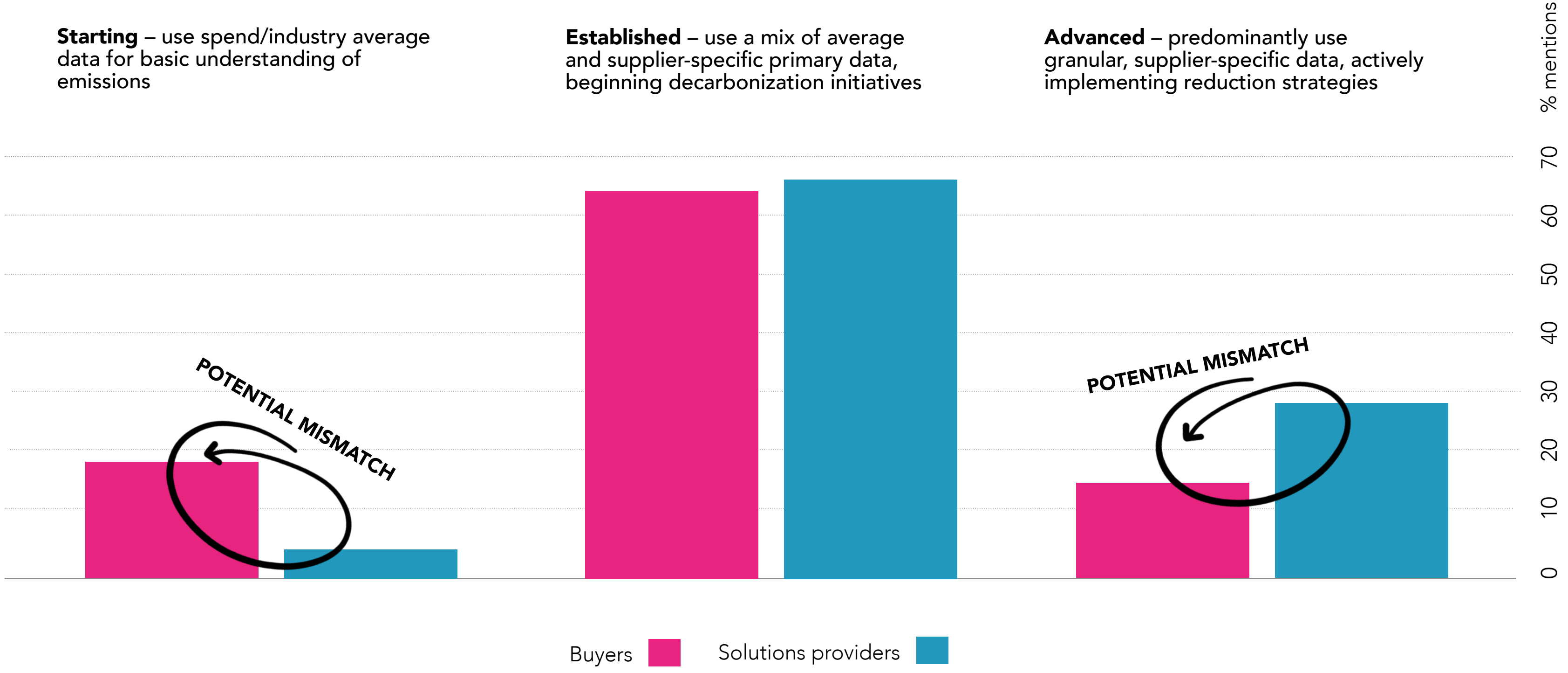
Buyer maturity: mostly intermediate, **but providers are targeting advanced**

66% of buyers describe themselves as 'established' or 'intermediate', using a mix of average and supplier-specific primary data, beginning decarbonisation initiatives. Only 15% are at 'advanced' maturity, and 18% are still at beginner stage.

Against this, 28% of solution providers target advanced customers – **nearly double the actual proportion of self-declared advanced buyers**. Only 4% of providers target beginners, despite 18% of buyers sitting there.

This mismatch has consequences: tools are often designed for a level of sophistication most current users haven't reached, contributing to complaints about complexity and over-engineering.

Overall maturity level solutions providers are targeting



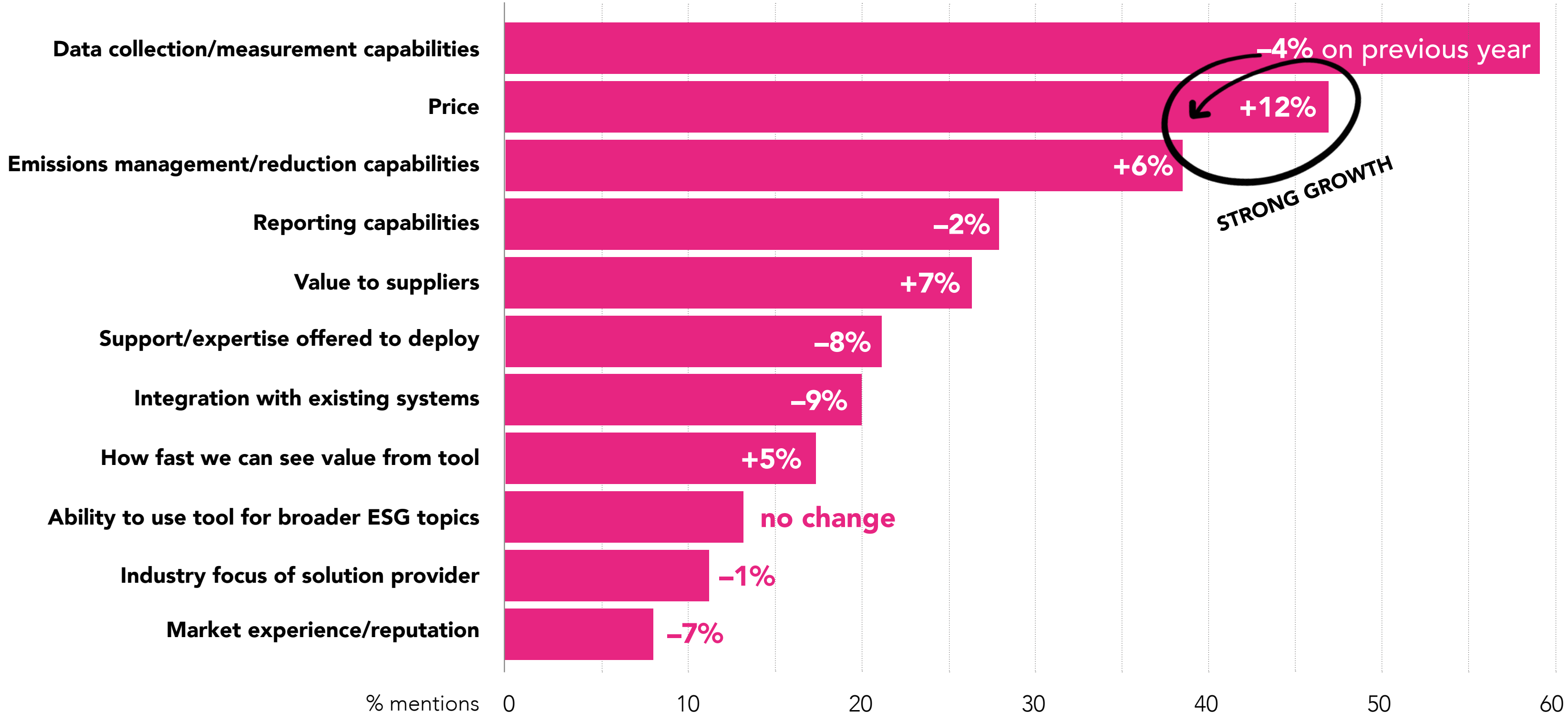
What buyers are looking for: **selection criteria**

When selecting a tool, buyers' top three criteria are: data collection and measurement capabilities (58%); price (47%); and emissions management and reduction capabilities (38%)

Compared to last year, **three key shifts stand out**:

1. 'Price sensitivity' surged from 35% to 47%, reflecting budget pressure and growing scepticism about value delivered
2. 'Value to suppliers' rose from 20% to 26%, suggesting buyers are starting to factor in supplier experience – likely driven by recognition that supplier fatigue undermines programme results
3. 'Integration with existing systems' fell (29% to 20%) – possibly indicating buyers have been disappointed on these fronts and have downgraded expectations.

What are the top 3 most important factors you take into consideration when selecting a digital solution?



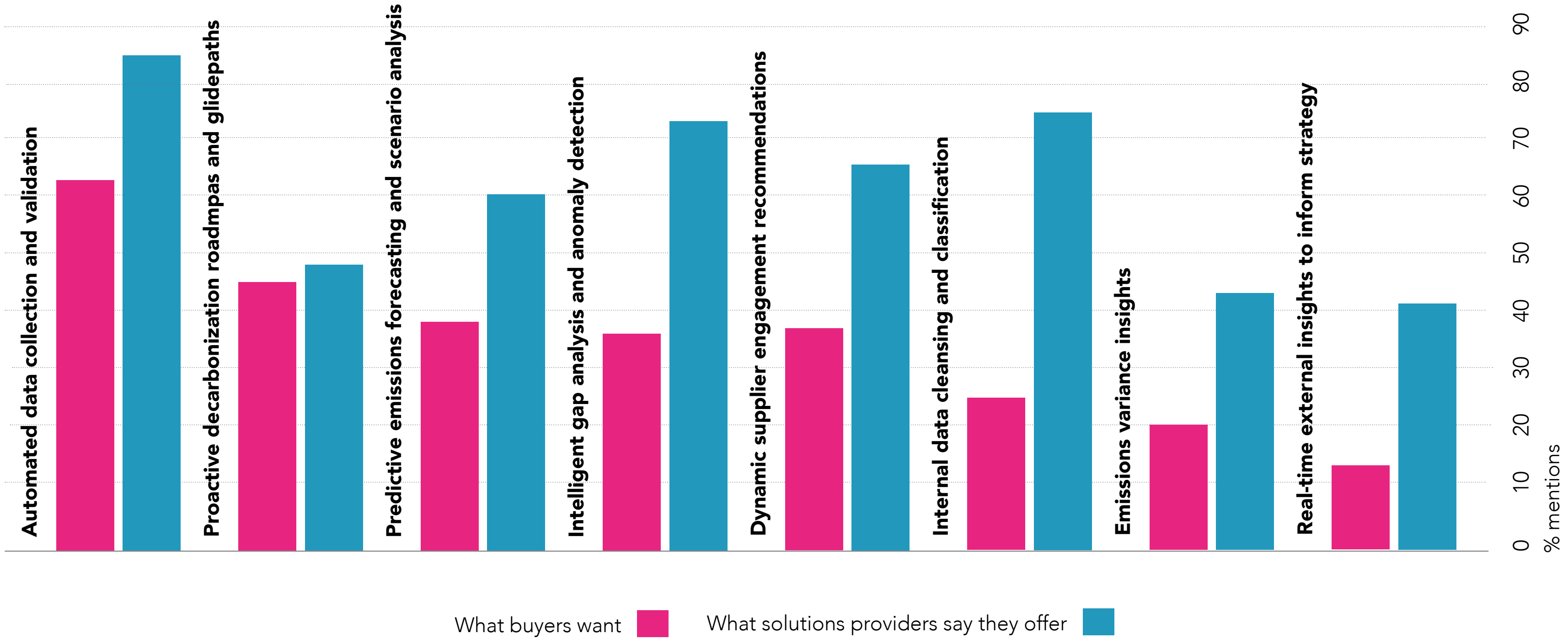
What buyers actually want: the **advanced capabilities wishlist**

There is a clear gap between what is most sought after and what is currently being offered by solutions providers – **the expectation/promise gap**.

We know solution providers are in a difficult position – some buyers issue long RFPs where features are requested as a list of 'have now' 'will have soon' items. In a competitive sector, there is an ongoing temptation to overplay what 'have now' really means.

We can see this weaved into various points of this year's survey. For example, **52% of buyers have rejected a solution due to missing features**. Yet when we asked solutions which truly advanced features they offered, around three quarters had everything. Based on our experience of the market we can see this being a point of overplaying what is really being offered.

Most sought after advanced capabilities – and what solutions providers say they offer



Why buyers **reject shortlisted vendors**

Among 91 buyers who had rejected a shortlisted vendor in the last 24 months, the top reasons were:

1. Price / total cost too high or unfavourable pricing model (54%)
2. Missing must-have features for our use case (52%)
3. Analytics / insights too weak to support decisions (29%)

The combination of price sensitivity and feature gaps tells a consistent story: **buyers feel they are being asked to pay significant sums for tools that don't yet deliver** on what's most important to their programme.

Yet, we also know it's tough for solution providers who are asked to invest in ambitious roadmaps covering a difficult problem space.

Scope 3 continues to be underfunded across different orgs, with "armies of one" typically leading the charge. This is also reflected in how price sensitive end-users are.

For solution providers, this is a call to switch to modular approaches and "pay for value" models.

For end users, this is a call to do a better job at building the business case for investing in a Scope 3 tool. Look for revenue impact (i.e. how many customers are asking for carbon data/actions) as part of the story.

1. **Price/total cost too high or unfavourable pricing model**
2. **Missing must-have features for our use case**
3. **Analytics/insights too weak to support decisions**
4. **Supplier effort too high (portal UX, duplication, steps, etc)**
5. **Implementation timeline/ resources too heavy**
6. **Interoperability with our systems**
7. **References/industry fit not convincing**
8. **Security/legal/compliance concerns**
9. **Support/geography/ language gaps**
10. **Commercial terms (contract flexibility, SLAs)**

What Peers have learned

75+ practitioners shared details on their hardest-won lessons about selecting and deploying Scope 3 tools. Eight themes emerged, with four being most common:

1

Define requirements before you engage any vendor

The most repeated piece of advice. Prepare a detailed Functional Requirements Specification before any demo. Know your end goal – certification, regulatory compliance, decarbonisation roadmap – before evaluating tools.

2

Don't trust demos. Test with your own data

The gap between a sales pitch and live product performance is consistently described as large. Run a pilot using your own messy, real-world dataset before entering commercials. Stress-test edge cases. Evaluate more providers than feels necessary – prices and capabilities vary far more than expected across the market.

3

Data quality is the real bottleneck, not the tool

Every tool's output is constrained by the quality of its inputs. Upfront investment in master data quality – product hierarchies, supplier lists, spend classifications – delivers more value than tool selection. No platform fixes weak underlying data.

4

Supplier engagement is a programme challenge, not a technology challenge

Tools cannot make suppliers participate. Embedding data submission requirements into procurement contracts and SLAs at appointment stage is more effective than any platform feature. Apply the 80/20 rule: focus engagement on the suppliers representing the largest emission share first.

Questions buyers should ask solution providers

Based on the combined feedback from this survey, the following questions are recommended for any tool evaluation process:

Capabilities

“ Can you demonstrate this feature working on data that looks like ours – not a curated demo dataset?

“ Which capabilities are fully live, which are in beta, and which are on the roadmap?

Data quality

“ How do you validate supplier-submitted primary data?

“ What proportion of your customers use primary data vs. spend-based proxies?

“ How do you handle missing or implausible data?

Supplier experience

“ What is your supplier net promoter score or satisfaction rating?

“ Can we speak to suppliers currently using your platform?

“ What does the onboarding journey look like?

Pricing

“ Is your pricing modular, do we pay only for what we use?

“ What does the total cost of ownership look like over 3 years including implementation, supplier access and support?

The roadmap

“ What is your upgrade cadence?

“ How do you incorporate customer feedback into the roadmap?

Lock-in

“ What does our data export look like if we decide to switch providers?

“ How much of our process will be embedded in your platform vs. portable?

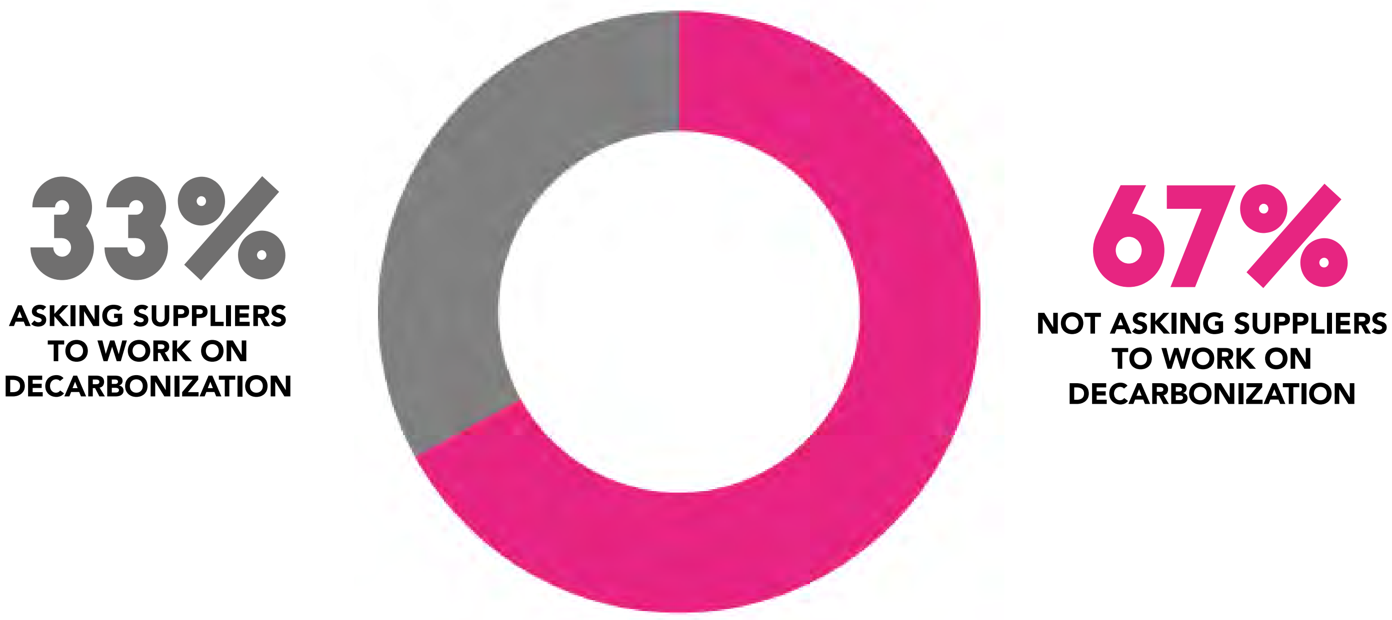
Only 33% of customers actively asking suppliers to work on GHG

Among supplier respondents – many of whom are themselves members of the Scope 3 Peer Group, meaning they are more sustainability-literate than average – only 33% of their customers (by revenue) are actively asking them to engage on GHG emissions. **67% are not**.

This is a structural gap: buyers cannot drive Scope 3 progress without supplier participation, yet the demand signal reaching suppliers is weak.

Encouraging your Peers and/or competitors to get involved and work with you is crucially important – **collaborate on infrastructure** (e.g. issuing data requests, etc) **and compete on the execution**.

Precentage of customers (by revenue) asking suppliers to work on decarbonization



Supplier satisfaction with tools is **low**

Suppliers rate Scope 3 and ESG tools at 3.5 out of 5 – notably higher than the 2.7 out of 5 they give to the spreadsheets and custom portals that buyers ask them to use directly.

Their top three requests from solution providers:

1. **Know me** – don't ask for data that is publicly available about my organisation
2. **Be selective** – ask only for data that will genuinely inform decisions
3. **Make it easy** – enable the same data to be reused across multiple customer requests

The fragmentation problem
Suppliers face a different platform, a different question structure and a different submission process for each customer. There is no standardisation, no data reuse, and no way to submit once and share. Within the Peer Group alone, suppliers reported being asked to use 39 different tools.

For suppliers with many customers, this compounds into a significant ongoing administrative burden with no proportionate benefit.

> “The best thing customers could do is move to a universal system so that suppliers are not required to adapt to and prepare separate reports in different platforms.

Three issues rated critical by suppliers:

1. **Platform interoperability** – custom data requirements per customer and per platform/portal adds an unnecessary overhead
2. **Disproportionate time burden** – completion is a significant resource commitment; many question whether the data is actually used
3. **Pay-to-play models** – being asked to pay to respond to a buyer's data collection request generated particular resentment

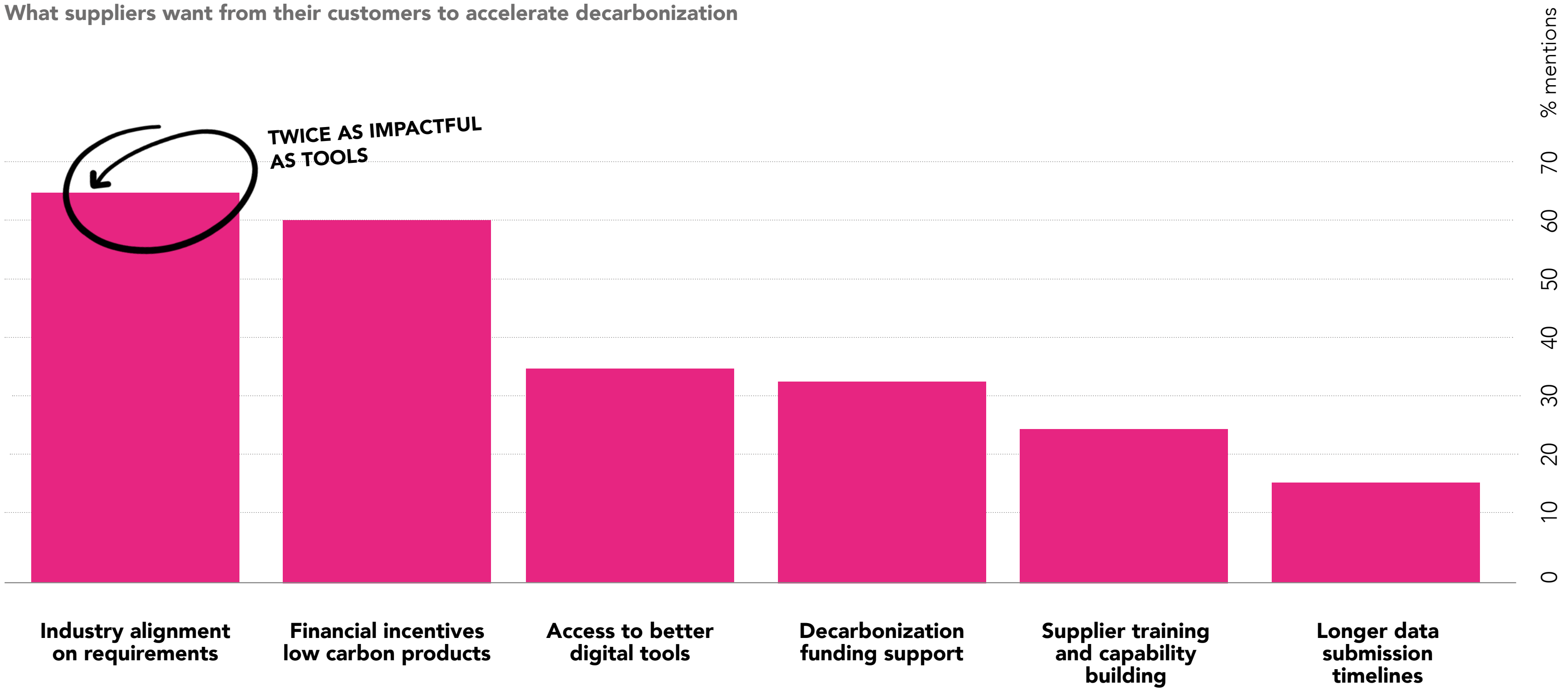
What suppliers want from buyers to **accelerate decarbonisation**

When asked what their customers should focus on to help them reduce emissions, suppliers' top responses were:

1. Industry alignment on requirements (65%) – the single most requested change
2. Financial incentives / preferred status for low-carbon products (60%)
3. Access to better digital tools (34%)

The message is clear: **suppliers want their customers to coordinate with each other on requirements, not just individually demand data.**

Industry-level alignment on what data is needed, in what format, on what timeline, would do more to unlock supplier participation than any individual platform improvement.



What solution providers claim **vs. what buyers experience**

The clearest market signal is that almost all solution providers are over claiming their capabilities.

Buyers know this – it is why 'missing must-have features' is the second most common reason for vendor rejection, even after providers have made it through to a shortlist.

The implication for providers: **overclaiming is not a sales tactic, it is a trust tax**. It drives scepticism, demands for pilots, and reluctance to pay premium prices for features that turn out to be shallow.

What providers say they offer vs. what buyers actually want most
Looking at the top claimed value propositions from solution providers:

1. **Supplier engagement tools** – tools and features to facilitate engagement and collaboration with suppliers (57% claim this as a top value proposition)
2. **Data quality** – high accuracy and reliability of data used for Scope 3 calculations (48%)
3. **Scalability** – capability to grow and adapt as the company's needs evolve (45%)
4. **Data granularity** – detailed and specific data for more precise Scope 3 calculations (35%)

There is reasonable alignment with buyer priorities here – data collection and supplier engagement are indeed what buyers rank highest. The problem is not the headline propositions but the depth of delivery against them. Buyers rank data collection as their #1 selection criterion (58%), yet **data quality and reliability consistently emerge as the biggest practical frustration across all three survey groups**.

What the market **needs from providers**

Buyers, suppliers and the Peer group combined offer a consistent picture of what good looks like. Across all qualitative feedback, seven improvement themes recur:

1. **Auditable and traceable data** – not just spend-based proxies with no methodology disclosure
2. **Granularity at product, material and regional level** – sector averages are insufficient for decision-making
3. **Supplier UX that is genuinely easy** – tiered onboarding, free supplier access, and clear value for the supplier, not just the buyer
4. **Action tools, not just measurement** – reduction scenario planning, decarbonisation roadmaps, SBT-setting support
5. **Platform simplicity** – the complaint ‘it does too much’ appears as often as ‘it doesn’t do enough’
6. **AI that reduces manual burden** – data scraping, validation, tagging – not AI as a marketing claim
7. **ERP integration** – manual upload as the primary data ingestion method is a fundamental infrastructure failure

What solution providers **need from buyers**

When asked what support from the Peer Group would be most valuable, this is what they said:

1. **Root-cause granularity on buyer pain points** – not 'supplier engagement is hard' but why it is hard, and what specifically breaks down

2. **Validated roadmap feedback** – practitioners willing to review and challenge provider product direction before it is built

3. **Market intelligence** – sizing by sector and geography, how buyers evaluate tools, budget cycle timing

4. **Early regulatory signal** – CSRD, GHG Protocol updates, PACT framework adoption

5. **Direct practitioner access** – structured user research and pilot partnerships outside the sales channel

The **highest-recommended tools**

Among tools with more than five ratings, the eight highest recommended by buyers (measured by Net Promoter Score-style likelihood to recommend) are shown here.

These span a range of use cases and maturity levels, suggesting that recommendation scores reflect quality of service and fit as much as breadth of features.

Notably, the overall average recommendation score across all tools is 6.3 out of 10 – **down from 6.6 last year**. Customers are demanding more, and the market as a whole is not keeping pace.

Implications and **recommendations**

For buyers

Start with strategy, not software
The single most consistent lesson from practitioners is that tool selection should be the last step, not the first. Define what success looks like for your Scope 3 programme – what categories matter, what level of data quality is required, what compliance obligations are driving timelines – before engaging any vendor. Organisations that skipped this step consistently report tools that don't fit, wasted budget, and the cost of switching.

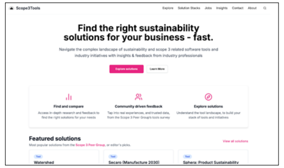
Pilot before you sign
The promise/expectation gap is real and documented. Every shortlisted vendor should be required to demonstrate their capabilities on your actual data – not a curated demo dataset. Budget time for this: a meaningful pilot typically takes 4-8 weeks but saves multiples of that time in avoided switching costs.

Fix your data before you deploy a tool
Master data quality – supplier hierarchies, product classifications, spend categorisation – determines the ceiling of any tool's value. Investment here before deployment consistently outperforms investment in additional tool features after deployment.

Build supplier engagement into contracts, not platforms
Supplier participation cannot be solved by tool features. The most effective mechanism is contractual: embed data submission requirements in supplier agreements at appointment stage. Combine this with the 80/20 rule – prioritise the suppliers representing your largest emission exposure – to get early traction without spreading effort too thin.

Accept the multi-tool reality
No single platform does everything. The average buyer uses 2.7 tools and that number is rising. Design your tech stack around outcomes – what you need for supplier engagement, product footprinting, corporate reporting and reduction planning may well be best served by different tools. The goal is interoperability, not comprehensiveness.

Keep up with the ever-evolving market
Tune into the fortnightly Scope 3 Podcast, and check out Scope3Navigator.com.



Implications and **recommendations**

For solutions providers

Stop overclaiming
The trust deficit in this market is provider-created. Buyers are sophisticated enough to distinguish between shallow feature implementations and genuine capability. Overclaiming drives demand for pilots, increases sales cycle length and reduces willingness to pay premium prices. Providers who are honest about current limitations and clear about roadmap commitments will differentiate meaningfully.

The action gap is your biggest product opportunity
Buyers are beginning to demand tools that help them act on emissions, not just measure them. Proactive decarbonisation roadmaps (45% demand), predictive forecasting (39%) and intelligent gap analysis (38%) are all growing rapidly as priorities. The providers who close this gap credibly – with working features, not marketing claims – will have an advantage.

Supplier experience is a buyer problem that you can solve
26% of buyers now list value to suppliers as a top selection criterion – up from 20% last year. Suppliers rate existing tools at 3.5/5. Their top asks are simple: don't ask for publicly available data, ask only for what matters, and make reuse across customers possible. The provider that solves this – ideally through a common data standard – will unlock significantly higher supplier participation rates for their entire customer base.

Price to the current reality, not the future vision
54% of buyers rejected a shortlisted vendor primarily on price – the highest rate recorded. Scope 3 teams are small and budgets are under pressure. Modular pricing, 'pay for what you use' models, and free supplier access are all cited by buyers and suppliers as enabling factors. The current pricing model of most tools is described as overpriced relative to functionality actually delivered.

Engage with the Peer Group as a research partner, not a sales channel
Providers consistently ask for what only a trusted practitioner collective can provide: aggregated, anonymised, root-cause insight into what is actually failing in the field. Structured participation in peer group research – user interviews, roadmap feedback sessions, pilot partnerships – gives providers better product intelligence than any amount of sales-channel feedback.

The Scope 3 tools market is at an **inflection point**

The first generation of tools has demonstrated that measurement at scale is possible. The next generation needs to demonstrate that **action is possible** – that the data collected can be turned into verifiable, supplier-driven emission reductions.

The practitioners in this survey are not passive technology consumers. They are building programmes under real budget pressure, with small teams, complex supply chains and increasing regulatory scrutiny. They have been burned by overpromising vendors and they are sharing those lessons openly. The peer group data makes those lessons available at scale.

The market gap between what is needed and what is currently delivered is large. That is not a reason for pessimism – it is the clearest possible statement of where the opportunity lies.

Credits

A big thanks to all of the **Scope 3 Peer Group** members who took part in the survey that helped to inform this intelligence report.

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Next steps

As you have seen, the market is continuing to change, we're hoping to see real acceleration in some areas, and expect consolidation in others.

To keep up with all the latest, and stay at the heart of the Scope 3 landscape:

- Check out the Scope 3 Peer Group in-person events
- Subscribe to the Scope 3 Podcast
- Create your free profile on Scope 3 Navigator
  As a vendor you can manage your solution(s) profiles, and as a peer favorite & compare solutions as well as access all the latest good practice, reports, and solution updates.

If you'd like to learn more about getting involved, contact Rhona, rhona@getgalvanised.com