

ANMD-MRS34-336 · Sustainable Tourism Technologies

Carbon-Tracking Booking Platforms

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Carbon-tracking booking platforms embed emissions data directly into travel booking — across flights, hotels and ground transport — so that corporates and travellers can measure, report and reduce trip carbon at the point of purchase. This decision-grade study sizes the global market two ways — value and units (bookings / platforms integrated) — across system type, corporate-travel module and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond convenience, carbon-tracking booking platforms deliver measurable, auditable trip-carbon reporting and supplier-level transparency, strengthening the responsible-travel story.

Mapped Sustainable Development Goals:

SDG 13 Climate Action	SDG 12 Responsible Consumption	SDG 11 Sustainable Cities	SDG 7 Affordable Clean Energy	SDG 17 Partnerships for Goals
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Measurable sustainability outcomes assessed:

- Auditable trip-carbon measurement embedded at the point of booking
- Supplier-level emissions transparency across flights, hotels and ground transport
- Corporate travel-emission reduction aligned to disclosure requirements
- Greenwashing and offset-credibility scrutiny as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, CSRD, the EU Taxonomy and GSTC, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	5 SDGs Mapped

MARKET OVERVIEW

From offset add-ons to embedded, auditable booking carbon — where every trip is measured, reported and reducible at source.

The carbon-tracking booking platforms market is moving from offset add-ons to embedded, auditable booking carbon. Demand is driven by corporate travel-emission reporting, CSRD and disclosure requirements and OTA sustainability differentiation, supported by supplier-data and GDS integration. The market is read two ways — value and units — and forecast under four scenarios, each region reported separately.

- North America is the corporate-carbon leader — the United States and Canada, on TMC and SAP-Concur-class embedding
- Europe is disclosure-driven — the UK, Germany and Spain, on CSRD and OTA sustainability features
- System type and application segment the value — across travel-booking carbon platforms, corporate-travel carbon and OTA integration
- Embedded, auditable carbon is the differentiator — measurement at the point of booking outperforms after-the-fact reporting

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Corporate-carbon leader	United States, Canada — TMC and SAP-Concur-class embedding
Europe	Disclosure-driven	UK, Germany, Spain — CSRD, OTA sustainability features
Asia Pacific	Emerging	Singapore, Australia — GDS and OTA carbon integration
Latin America	Emerging	Brazil, Mexico — OTA and corporate-travel carbon
Africa	Frontier	South Africa — corporate-travel and OTA pilots
Middle East	Frontier	UAE — airline and OTA carbon integration

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Corporate travel-emission reporting • CSRD & disclosure requirements • OTA sustainability differentiation • Supplier-data & GDS integration • Booking-API & carbon-engine maturity	• Supplier-data coverage & accuracy • GDS / OTA integration complexity • Greenwashing & offset-credibility scrutiny • Commission & monetisation models • Data privacy across booking chains

SEGMENTATION SNAPSHOT

By System Type	Travel-booking + carbon platforms · corporate travel carbon · OTA carbon integration
By Corporate Travel	TMC-embedded · policy-enforcement · reporting-suite · offset-linked
By Application	Flights · hotels · ground / rail
By End User	Travellers · corporates · travel agents · suppliers
By Business Model	Commission · SaaS / corporate · transaction-fee · licensing
By Deployment Scale	Consumer · corporate · supplier-integrated

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Carbon-Tracking Booking Platforms
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
- › Chapter 17. Middle East Market Intelligence
- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
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- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
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Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
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- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans travel-distribution and carbon-platform vendors, platform specialists and integrated system providers. Deal activity — GDS carbon integrations, TMC partnerships and carbon-engine acquisitions — signals a market organising around embedded, auditable booking carbon.

Representative players profiled in the full report:

Amadeus IT Group, S.A. · Sabre Corporation · Travelport Worldwide Limited · SAP SE (Concur) · CHOOOSE AS · and 20+ further profiled players across the value chain.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a decision-ready investment verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global carbon-tracking booking platforms market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do the economics of carbon-tracking booking platforms change returns versus incumbent approaches?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › **Triangulated sizing** — every market read across two ways — value and units (bookings / platforms integrated) so the views reconcile rather than conflict.
- › **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, decision-ready investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, travel-tech vendors and OTAs, travel-management companies, corporates and travel agents, travel suppliers, research institutions, policymakers, and corporate strategy and ESG teams. This report supports investors, operators, developers, manufacturers, lenders and policymakers — alongside strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.