Market Perception Trends: EHS Service Providers (2025)

This report helps strategy executives, chief marketing officers and business development directors at EHS services firms understand their brand strength, in terms of preference and awareness, relative to their principal competitors. We conducted the brand awareness study using the perspective of 304 EHS executives across 25 countries and 24 industries, as part of the 2024 Verdantix Global Corporate survey of EHS budgets, priorities and technology preferences (see Verdantix Global Corporate Survey 2025: EHS Budgets, Priorities and Tech Preferences). Survey respondents were senior decision-makers within their corporate EHS functions, with all participants holding the titles of VP, SVP, Director, Senior Director, Senior Manager or Manager. Survey results indicated that the largest integrated service providers have the most positive brand perception for their EHS capabilities, despite their area of focus being much wider than EHS and its associated topics, such as operational excellence, sustainability and artificial intelligence.

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# Corporate brand perception of EHS services vendors

Data on EHS priorities, budget forecasts and technology adoption across various industries and geographies provides vital information that can help executives shape their strategies for EHS investment. For the 2025 Verdantix EHS services brand perception study, Verdantix collected data from:

* **304 respondents with revenues of at least $250 million.**

Of the 304 EHS decision-makers interviewed, 74% were employed at firms with revenues of at least $1 billion. The respondents’ demographics comprised 26% from firms in the mid-market segment with revenues of $250 million to $1 billion; 41% from firms in the core enterprise segment with revenues of $1 billion to $10 billion; and 33% from the large enterprise segment with revenues above $10 billion. Breaking down the large enterprise segment further, 16% of firms have revenues greater than $20 billion. The seniority levels of respondents are split into three tiers: 34% in SVP, VP or head of function roles; 33% in senior director or director roles; and 34% in senior manager or manager roles.

* **24 industries, 36% of which have high or very high EHS risk.**

The 2025 global survey covers 24 industries, segmented into four categories based on perceived EHS risk: very high, high, medium and low (see **Figure 1**). In aggregate, 38% of the interviewed EHS decision-makers represent industries with high to very high EHS risk profiles. Industries with a very high EHS risk profile – chemicals; mining, metals and minerals; and oil and gas – accounted for 23% of respondents. This year’s survey placed the greatest focus on industries with medium EHS risk profiles, represented by 52% of respondents. Industries categorized as medium EHS risk include healthcare, waste management and vehicle manufacturing.

* **25 countries, focused on regions with higher levels of EHS spend.**

The 304 respondents that participated in the 2025 survey are spread across 25 countries and grouped into five geographical regions: Asia-Pacific (APAC), Europe, Middle East and Africa, Latin America and the Caribbean, and North America (see **Figure 2**). Regions with higher levels of EHS spend – North America and Europe – constitute a larger percentage of surveyed EHS decision-makers. The North American region – Canada, Mexico and US – accounts for 27% of respondents, while Europe comprises 31%. The Asia-Pacific region – which includes Australia, China, India, Indonesia, Japan and Korea– accounts for 19% of survey respondents.

**Figure 1.**

**Figure 2.**

# Service providers can help firms realize the potential of their EHS digital ecosystems

Alongside software, firms often leverage EHS service providers. These are consulting firms that provide numerous capabilities such as the implementation of EHS software, initiatives to help implement best practices and improve client firms’ programmes and technical expertise regarding challenging EHS processes. These organizations can range from smaller specialists with niche capabilities, to broader firms that operate across various business functions on a global scale.

## Global brand status aligns with consultancies’ perceived EHS capability strength

Service providers vary widely - from smaller, specialized vendors focused exclusively on EHS-related issues to larger firms with expertise spanning multiple categories beyond EHS. To understand market sentiment, Verdantix surveyed decision-makers on their assessment of key service providers’ capabilities across EHS domains. The findings reveal that:

* **The “Big Four” consulting providers are perceived as the market leaders.**

Leading consulting firms come with a global brand and trusted reputation. In the global corporate survey, these players have dominated, with three of the “Big Four” consultancies occupying the top five spots. Specifically, 7% of respondents considered Deloitte and EY as market leading (see **Figure 3**). Deloitte has maintained is position as the leader for brand preference in the EHS services market for a number of years (see [Verdantix Global Corporate Survey 2023: EHS Services Brands Recognition](https://www.verdantix.com/report/global-corporate-survey-2023-ehs-services-brands-recognition)). Furthermore, PwC was considered to be market leading or offer strong capabilities by 40% of respondents. These large vendors have built a strong reputation as a trusted consulting partner, leveraging their extensive organizational resources and global presence to address complex needs.

* **Specialized expertise enhances the market position of niche consultancies.**

While broad consulting firms benefit from global reputations, several EHS-focused consultancies have also established strong brands by leveraging deep industry expertise and delivering innovative solutions. Their dedicated focus on environment, health, and safety ensures access to a wide pool of subject matter experts with a nuanced understanding of market dynamics and available technologies, enabling them to deliver niche, much-needed services. For instance, DEKRA has long established expertise for ensuring road safety, whereas dss+ has cemented itself as a leading provider of training services given it has developed a library of more than 600 e-learning and microlearning courses in 35 languages. Furthermore, ERM provides niche expertise by offering an AI-powered analytics tool, Connected Safety, which is used in conjunction with subject-matter experts to help evaluate EHS data (see [Verdantix Smart Innovators: Health And Safety Consulting Providers](https://www.verdantix.com/client-portal/report/smart-innovators-health-and-safety-consulting-providers)). These firms’ expertise is reflected in survey results, ERM was viewed as market leading or having strong capabilities by 34% of respondents, whereas DEKRA and dss+ ranked fifth and sixth in market-leading brand recognition.

* **Engineering services firms’ assistance with EHS matters is valued.**

Arcadis and SGS, both categorized as integrated engineering services firms, placed into the top ten services firms in terms of market-leading brand recognition. They deliver a wide array of services, from management consulting and engineering to design and specialised support - covering everything from high-level strategic planning to on-the-ground execution. In the past year both Arcadis and SGS have demonstrated especially strong expertise in supporting environmental compliance. Arcadis won a $1.5bn contract to support US Air Force environmental programs worldwide, meanwhile, SGS launched a new enhanced per- and polyfluoroalkyl substances (PFAS) contamination testing for environmental samples. Clients appreciate their ability to pair deep technical knowledge with flexible, responsive delivery.

**Figure 3.**

# The demand for services is shaped by EHS function being shaped by global disruption, AI development, and an EHS skill shortage

The Verdantix brand survey ranked Deloitte, ERM, EY, PWC and DEKRA, as the leading five vendors in terms of perceived EHS capabilities. To understand why firms are perceived the way they are, Verdantix reviews market trends from our wider research to identify the most significant factors impacting the growth of EHS service organizations. Our research finds that:

* **Global disruption adds a new dynamic to how EHS service firms are perceived.**

Firms with strong geopolitical insight and close ties to policymakers are increasingly valued for their ability to guide clients’ EHS strategies through regulatory disruption. The wave of national elections in 2024 -many resulting in leadership changes - has accelerated shifts in the regulatory landscape for 2025, particularly in ESG compliance. As requirements change and vary across regions, organisations with transnational EHS programmes are turning to service providers to help with establishing and implementing consistent global EHS practices that remain sufficient in the context of local regulatory regimes. This uncertainty is compounded by ongoing conflicts in Europe and the Middle East, which continue to disrupt supply chains and reshape operational priorities. In response, firms are seeking trusted EHS advisors who can help them with crafting agile, compliant, and cost-effective EHS operations in an increasingly unpredictable global environment.

* **Perception of expertise in artificial intelligence influences consultancies’ market ranking.**

EHS is no different to most other administrative-heavy professions in that integrating artificial intelligence into workflows is a key priority, as exemplified in the wider EHS global corporate survey in which over 46% of EHS practitioners stated implementing AI to increase EHS automation and realise time savings was at least a very important priority. Accordingly, EHS service firms have scaled up their AI literacy to meet this growing need, with firms focussing on issues like helping EHS functions identify the higher value use cases for AI implementation and ensuring that AI technologies are trustworthy before they are used in live operations at scale. For instance, in 2025, DEKRA, an independent testing, inspection and certification service provider, began offering an integrated digital trust service that ensures the safety and security of AI-driven technologies. Furthermore, Accenture’s highly regarded AI expertise explains why the firm was highly ranked for its EHS capabilities despite the firm having relatively scarce EHS marketing.

* **Consultancies that can deliver and share specialized expertise is highly valued.**

EHS functions are facing mounting pressure to access specialised expertise, as internal teams struggle to keep pace with growing demands. Regulatory requirements are becoming increasingly complex, while a persistent shortage of experienced EHS professionals continues to limit available support. Many organisations are still grappling with the aftereffects of the 2021–2023 ‘Great Resignation’ and the ongoing loss of institutional knowledge as seasoned practitioners retire, leaving critical gaps in capability. In the short term, this lack of expertise makes it difficult for EHS teams to navigate specific compliance and safety challenges. In the long term, it poses a strategic risk, as overstretched senior staff lack the capacity to train junior professionals in more specialised areas. To bridge this gap, Verdantix anticipates that EHS functions will increasingly turn to external service providers - both to meet immediate demands and to support long-term upskilling efforts. This movement to use services to upskill staff is demonstrated in the latest Verdantix Global Corporate Survey, where we asked executives about their EHS priorities, budgets, and technology preferences. Notably, 31% of respondents plan to increase their investment in EHS training, learning, and development by more than 10% in 2026 compared to 2025.