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White Paper

Carbon Capture and Storage: Market Outlook

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The global Carbon Capture and Storage (CCS) market is growing driven by

- Climate imperatives strengthening,
- Government regulatory requirements and incentives,
- Developing commercial models and
- Maturing technology.

This white paper provides a comprehensive analysis of the current carbon capture and storage landscape and future market outlook from 2025 to 2035.

The global CCS market has experienced steady growth in recent years, though estimates vary with various analysts estimating the CCS market around USD 2bn - 6bn today and growing at between 7-14% per annum. Despite this growth, the scale remains far below what climate models suggest is necessary. The International Energy Agency (IEA) has signalled that CCS storage capacity will need to increase approximately 90 times from 2022 levels to reach around 4.0 Gt by 2040 and 10.0 Gt by 2050 to align with a 1.5-degree scenario for global warming.

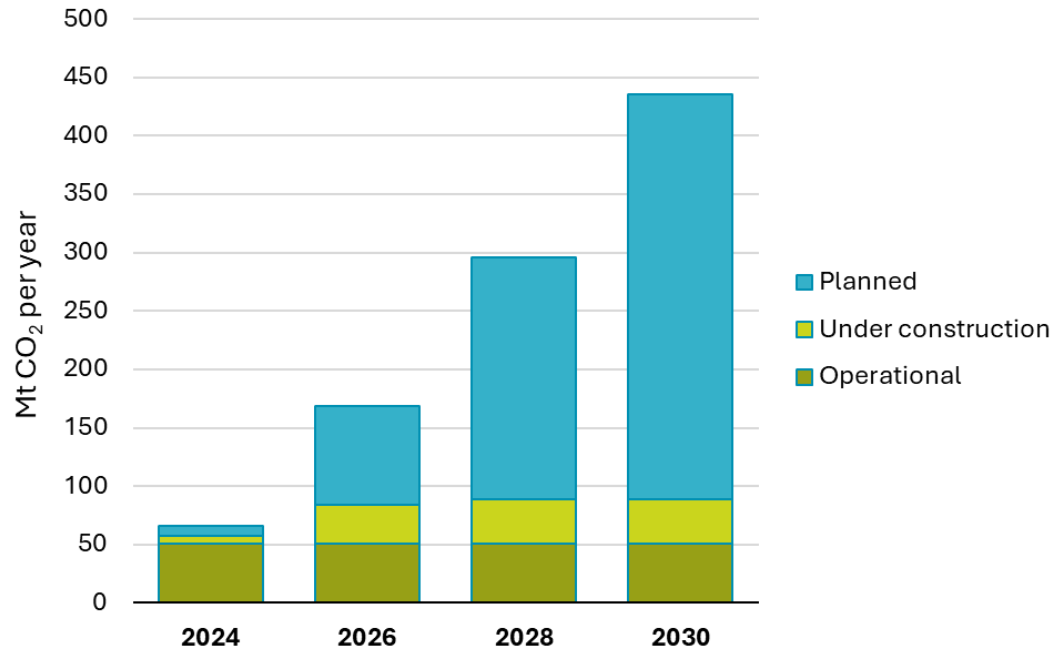
Current projections indicate significant growth potential, with estimates suggesting expansion from approximately USD 5.47 bn in 2025 to USD 20.59 bn by 2035, representing a compound annual growth rate (CAGR) of 14.2%. This growth trajectory is driven by increasing environmental regulations, corporate net-zero commitments, and the recognition of CCS as an essential technology for decarbonising hard-to-abate sectors. The technology is particularly valuable for decarbonising industries where direct electrification or alternative technologies face significant challenges, including cement production, steel manufacturing, chemicals, and certain power generation applications.

Success will require coordinated effort from policymakers, industry leaders, financial institutions, and civil society. As the Global CCS Institute emphasises, achieving global climate targets will require annual CO_2 storage rates of approximately 1 Gt per year by 2030, growing to around 10 Gt per year by 2050. While current deployment falls short of this trajectory, the accelerating project pipeline and strengthening policy support offer promising signs for the future of this essential climate technology.

Current Status

Today the International Energy Agency (IEA) database shows well over 1000 storage projects in various stages of planning and development. The Global CCS Institute's 2023 report notes that the current storage capacity exceeds 400 Mt per year.

Exhibit 1 : Operational and planned capture CCUS capacity (source data: IEA, 2025)



Notes: Includes all operational and operational, under construction and planned CO2 capture facilities with an announced capacity of more than 100 000 t per year (or 1000 t per year for direct air capture facilities) and an announced timeline. Obtained by summing the estimated capacity of capture, full chain and CCU projects in the IEA CCUS Projects Database. 2024 includes all announced capacity which could come online by the end of 2024.

Market Dynamics and Drivers

Growth Drivers

Several key factors are propelling the expansion of the global CCS market:

Increasing Carbon Emissions and Environmental Concerns

Growing concerns about the detrimental effects of carbon emissions prompting the adoption of CCS worldwide. This trend is expected to intensify as climate impacts become more evident and public pressure for meaningful climate action increases. Various governments are recognizing CCS's ability to achieve large-scale CO_2 emission reductions and are encouraging CCS implementation through pilot projects across different industries, Government Incentives and Regulatory Support

Government support through incentives, grants, and subsidies is playing a crucial role in accelerating CCS deployment. Currently in the United States, the enhanced 45Q tax credits through the Inflation Reduction Act have significantly improved the economic viability of CCS projects. The UK government has announced up to GBP 20 bn to support the initial deployment of CCUS, with plans to create four CCUS clusters by 2030, storing 20 to 30 Mt of CO_2 a year and delivering 50,000 jobs. The European Union's Emissions Trading System (EU ETS) creates economic incentives for emissions reduction technologies, while the EU Innovation Fund provides capital support for first-of-a-kind commercial demonstrations. These policy frameworks help offset the high capital costs associated with CCS projects and encourage private sector investment.

Corporate Net-Zero Commitments

The world shift towards net-zero emissions by 2050 is building opportunity for CCS in energy and industry. Major corporations across various sectors have established ambitious climate targets that often necessitate the deployment of technologies like CCS, particularly in hard-to-abate sectors. These commitments drive investment and create market demand for effective carbon reduction solutions.

Integration with Other Low-Carbon Technologies

The integration of CCS with complementary technologies is creating new opportunities for emissions reduction. A significant trend is the combination of CCS with renewable energy projects, particularly in the power generation sector. Companies are increasingly exploring hybrid solutions that combine CCS with biomass power generation, solar, and wind energy to achieve negative emissions.

The growing market for low-carbon hydrogen also presents a major opportunity for CCS. "Blue hydrogen," produced from natural gas with CCS, provides a near-term pathway to scale up hydrogen production while keeping carbon emissions low. As hydrogen gains traction as an energy carrier and industrial feedstock, the demand for blue hydrogen production facilities with integrated CCS is expected to increase substantially.

Market Challenges

Despite the promising growth projections, the CCS industry faces several significant challenges:

High Capital and Operational Costs

The high capital investment costs of CCS projects is a major factor in industry growth. CCS projects require significant upfront investments, as the technology is relatively complex and commands high initial costs for setting up capture, transportation, and storage infrastructure. Operating costs, including energy requirements for the capture process and ongoing monitoring of storage sites, further challenge the economic viability of CCS.

Infrastructure Limitations

The development of CCS is hindered by the required transportation and storage infrastructure. Building dedicated CO_2 pipelines or retrofitting existing pipelines requires substantial investment and faces potential regulatory and public acceptance challenges. Similarly, developing geological storage sites involves extensive subsurface characterisation, permitting, and monitoring requirements.

Project Complexity Risks

CCS projects often face "project-on-project" risks, where misalignment between different components of the CCS value chain (capture, transport, and storage) creates dependencies that can compromise overall project viability. For example, capture projects may be delayed if transportation infrastructure is not available on schedule, or storage projects may become stranded assets if upstream capture projects fail to materialise.

Policy and Regulatory Uncertainty

Uncertainty in regulatory frameworks creates challenges for CCS project developers and investors. The lack of clear, consistent regulations regarding CO_2 storage liability, monitoring requirements, and cross-border transport can delay project development and increase perceived risks. The evolving nature of climate policies and carbon pricing mechanisms also

introduces uncertainty regarding the long-term economic viability of CCS projects, potentially deterring investment.

Current Regulatory Framework

Across different jurisdictions, comprehensive regulatory frameworks are developing to ensure that geologic storage projects do not threaten underground sources of drinking water or other sensitive groundwater resources. These regulations typically govern every phase of a storage project, including:

- **Site Selection and Characterisation**: Operators must demonstrate that the chosen site has the right geological conditions for long-term CO_2 containment. The storage complex's vertical and lateral boundaries must be clearly defined, and protected groundwater resources must be identified and excluded from the storage domain. This requires detailed geological, geophysical, and geochemical assessments to confirm the presence of effective confining layers such as caprocks or seals and to identify any potential migration pathways, such as faults or legacy wells.

  Seismic data is fundamental for the effective characterisation and risk assessment of geological carbon storage sites. In the United Kingdom, The North Sea Transition Authority (NSTA) requires licensees to use high-quality seismic data to map storage sites, including secondary containment zones, sealing units, faults, and potential leakage points. This mapping is essential for defining the storage complex, assessing containment integrity, and identifying uncertainties. Licensees must demonstrate that seismic data is sufficient to characterise the site and inform risk analysis, particularly regarding potential threats to containment.

- **Well Design and Construction**: Wells must be engineered to withstand injection pressures and prevent leaks, with robust construction standards to ensure integrity over the project's lifespan.

- **Operational Controls and Monitoring**: Safe injection pressures and rates are established to avoid fracturing the storage formation and to keep CO_2 securely contained. Continuous and periodic monitoring is mandated, including regular well integrity testing and subsurface monitoring such as pressure tracking and plume movement using dedicated monitoring wells and geophysical surveys.

- **Emergency Response and Financial Responsibility**: Operators must have plans and financial resources in place to address any incidents or leaks and to ensure the site's long-term safety.

- **Site Closure**: When injection operations cease, the site must be closed in a manner that guarantees continued containment of CO_2, with ongoing monitoring as required.

Oversight is enforced through permitting, inspections, reporting, and compliance reviews to ensure all regulatory requirements are met.

Technology Landscape and Innovation

Current Technologies

The CCS technology landscape encompasses various approaches for capture, transport, and storage, each with specific applications and maturity levels.

Carbon Capture Technologies

The three main carbon capture approaches include:

1. **Pre-combustion**: A gasification process converts primary fuel into synthesis gas, from which CO_2 is separated.
2. **Oxy-fuel combustion**: Primary fuel is combusted in pure oxygen instead of air, producing flue gas with mainly water vapor and a high concentration of CO_2.
3. **Post-combustion**: CO_2 is separated from flue gases after combustion, making this approach ideal for retrofitting existing facilities.

Post-combustion carbon capture, which is particularly suitable for retrofitting existing coal and natural gas power plants, is expected to dominate the market in 2025 with approximately 48% market share.

Transport

Pipeline transport represents the most common and cost-effective method for moving large volumes of CO_2 over land. For efficient transport, CO_2 is typically compressed to a supercritical state, which reduces volume and allows for higher throughput. CO_2 shipping is emerging as an alternative, particularly for offshore storage sites, with the first transboundary movement of CO_2 by ship for geological storage completed between Belgium and Denmark in 2023.

Storage

Geologic sequestration is a climate change mitigation strategy that involves injecting CO_2 deep underground, thereby preventing its release into the atmosphere. Permanent CO_2 sequestration is typically achieved by storing CO_2 in one of four types of geological storage:

- **Deep Saline Formations**: These are extensive, porous rock layers saturated with saltwater. They represent the largest potential global storage capacity for CO_2 due to their widespread availability and ability to securely trap injected gas.
- **Depleted Oil and Gas Fields**: These formations have already been mapped and exploited for hydrocarbons, making them well-understood and suitable for CO_2 storage. Utilizing existing infrastructure can also reduce project costs and complexity.
- **Non-mineable Coal Seams**: Coal beds that are too deep, thin, or poor in quality for economic mining can adsorb CO_2 onto their surfaces, providing another permanent storage option.
- **EOR:** A notable application of geologic sequestration is enhanced oil recovery (EOR), in which CO_2 is injected into mature oil fields to boost the extraction of remaining oil reserves. While this process supports continued fossil fuel production, it also serves as a form of geological storage, as a significant portion (up to 60%) of the injected CO_2 remains permanently trapped in the reservoir. The oil and gas industry EOR represents the largest application for CCS today, expected to account for approximately 42% of the market in 2025.

Emerging Technologies and Innovation

The carbon capture and storage industry has begun deploying fibre optic sensing in Class VI wells for measuring, reporting, and verification of mechanical integrity testing and vertical seismic profiling (VSP). VSP provides time-lapsed images of the CO2 plume developing in the subsurface. Ideally, time-lapse VSP imaging should be calibrated with CO2 volumetrics.

Research into advanced materials and processes is yielding promising results that could significantly improve the efficiency and reduce the costs of carbon capture:

Advanced Materials

Metal-organic frameworks (MOFs) represent a particularly exciting development in carbon capture research. These highly porous solid materials act like high-absorbency sponges and can be engineered to capture specific gas molecules. Their vast surface areas allow for high-volume CO_2 collection, which is promising for the development of more efficient methods of carbon capture.

Direct Air Capture

Direct air capture (DAC) represents an emerging technology that extracts CO_2 directly from the atmosphere rather than from point sources. While currently more expensive than point-source capture due to the low concentration of CO_2 in the atmosphere, costs are expected to decrease as the technology matures and scales. DAC is increasingly regarded as a necessary complement to point-source capture for achieving net-zero emissions.

Carbon Utilisation Pathways

Carbon utilisation technologies that convert captured CO_2 into valuable products are expanding beyond traditional applications like EOR and urea production. These utilisation pathways could expand the market for captured CO_2 to between 430-840 Mt per year by 2040, according to industry estimates. The Oil and Gas Climate Initiative identifies four promising CO_2 utilisation pathways through to 2040:

4. **Construction aggregates**: This represents the largest potential market in terms of CO_2 volume (estimated at around 0.5 Gt CO_2 per year), though low product value makes competition with conventional aggregates challenging.
5. **Synthetic fuels**: These are produced using captured CO_2 and hydrogen, offering a pathway to decarbonise transportation sectors that are difficult to electrify.
6. **Chemicals and polymers**: This pathway incorporates CO_2 as a feedstock in chemical manufacturing processes.
7. **Enhanced weathering**: This method accelerates natural mineral carbonation processes to permanently sequester CO_2.

Regional Analysis

North America

North America, particularly the United States, leads the global CCS market. The North American market is characterised by large-scale capture projects, robust federal incentives, and an established regulatory framework. The United States has the largest number of carbon capture and storage projects, with over 170 planned storage projects reported as of 2024. The region benefits from extensive geological storage capacity, existing CO_2 pipeline infrastructure for EOR, and significant government support. The United States market is expected to maintain its growth trajectory, with a projected CAGR of 14.2% from 2025 to 2035, though political uncertainty related to administration changes could impact the pace of development.

In the United States, the enhanced 45Q tax credit program currently provides crucial financial incentives, offering up to USD 85 per tonne for CO_2 permanently stored and USD 60 per tonne

for CO_2 used in EOR or other utilisation pathways. The US Department of Energy provides loans covering up to 80% of the cost for early-stage CCS projects.

Canada is also a major player, with more than forty projects in the pipeline primarily concentrated in Alberta and Saskatchewan. Canada's CCS expansion is supported by robust federal and provincial incentives, including investment tax credits covering up to 60% of capital costs for certain projects, and a rising national carbon price. The federal government aims to increase CCS capacity from 7 Mt per year today to at least 15 Mt by 2030.

Europe

Europe is experiencing accelerated growth in CCS deployment, driven by the European Union's "Fit-for-55 package", the European Green Deal, and national-level initiatives. The region is focusing on cluster-based approaches that combine industrial CO_2 sources with offshore storage in the North Sea.

According to the Global CCS Institute, "In Europe, 35 CO_2 transport and storage networks are in development. Other industries where CCS features prominently include hydrogen, ammonia and fertiliser facilities (20), power generation and heat (19 facilities), cement (17 facilities), and biomass to power/heat (15 facilities)".

The United Kingdom is advancing CCS through government-backed industrial cluster plans in regions such as Teesside and Humber, and Liverpool Bay. The UK government envisions CCUS as "a game-changer for the UK's energy transition, with "capacity to safely store up to 78 billion tonnes of CO_2 under our seabed – one of the largest such capacities in the world".

In April 2025, Eni and the UK Government achieved financial close on the Liverpool Bay Carbon Capture and Storage (CCS) project. As the backbone of the HyNet industrial cluster, the Liverpool Bay CCS project will transport CO_2 captured from a range of emitters across Northwest England and North Wales to permanent storage in Eni's depleted gas reservoirs beneath the Liverpool Bay seabed. The initiative will repurpose 149 km of existing pipelines and construct 35 km of new links.

Norway's Longship project, including the Northern Lights CO_2 transport and storage component, represents one of Europe's most advanced CCS initiatives. The Netherlands' Porthos project aims to transport and store CO_2 from the Rotterdam industrial area in depleted gas fields beneath the North Sea. The North Sea remains the dominant storage region, but new opportunities are emerging in southern and eastern Europe, including the Adriatic Sea (Italy), and onshore storage is being explored in Denmark and Poland.

The European Union CCS market is projected to grow at a CAGR of 14% from 2025 to 2035, with the UK growing at a similar pace.

Asia-Pacific

The Asia-Pacific region is emerging as a significant hub for CCS, led by China, Australia, Japan, and South Korea. According to the Global CCS Institute, "A total of 12 facilities are operational (five facilities commencing operations in 2022/23 in China), eight in construction, and 34 in advanced or early development" in the Asia-Pacific region.

China's approach focuses on integrated carbon capture in chemicals production and coal-fired power plants. Australia is spearheading CCS in the liquefied natural gas (LNG) sector, with projects such as Gorgon CCS representing one of the world's largest CO_2 storage initiatives. Japan is ramping up CCS investments to decarbonise its hydrogen supply chain and fossil-

based industrial output. The government is funding CO_2 capture from ammonia and LNG plants, with storage partnerships extending into neighbouring countries.

South Korea is pursuing CCS under its Green New Deal and 2050 carbon neutrality plan. Companies like POSCO and Hyundai Oilbank are leading adoption, particularly for blue hydrogen and steel decarbonisation. The country is constructing underground CO_2 storage facilities within offshore basins and converting LNG terminals to handle liquefied CO_2.

Market Forecast (2025-2035)

Overall Market Projections

The global carbon capture and storage market is poised for significant growth over the next decade, though projections vary depending on assumptions about policy support, technological development, and market adoption rates.

Based on the most recent market analyses, the global CCS market is expected to grow from approximately USD 5.5bn in 2025 to USD 20.6 bn by 2035, representing a compound annual growth rate (CAGR) of 14.2%. This base scenario assumes continued policy support, moderate cost reductions, and growing acceptance of CCS as a necessary component of decarbonisation strategies.

In terms of CO_2 capture capacity, Bloomberg New Energy Finance, a strategic research provider, foresees an eightfold increase towards 2030 based on current project announcements. Operational capacity could grow globally from around 50 Mt of CO_2 captured per year to 165 Mt by 2025, and just over 400 Mt by 2030 – provided that all announced projects follow through.

Under a conservative scenario, global CCS deployment would be constrained by policy uncertainty, continued high costs, and competition from alternative decarbonisation technologies. This scenario might see a CAGR closer to 10%, resulting in a more modest market growth.

The cautious view is supported by observations from ING, which notes that "growth isn't proving as fast as hoped for – or as needed". The report highlights that "not every announcement has the same status. Many announcements are about 'drawing board projects', few are about 'FID-projects' for which the final investment decision has been made and where construction is already underway or will start soon".

More aggressive scenarios would see accelerated deployment driven by strong policy support, rapid technological advancement, and mainstream adoption across multiple sectors. Whilst these are considered optimistic, they underscore the potential for substantial market expansion under favourable conditions.

However, these projections should be viewed with caution, as the realisation of announced projects depends on various factors, including policy stability, economic conditions, and the successful resolution of technical and regulatory challenges. Historical experience suggests that not every announced project will proceed to final investment decision and completion.

Investment Landscape

Current Investment Trends

Investment in CCS has accelerated in recent years, driven by strengthening policy support, corporate climate commitments, and technological advancements. According to the Global CCS Institute, "The last 12 months have seen a significant increase in equity financing and interest in project finance for CCS projects. Many businesses seeking to profit from the provision of CCS services, especially in the storage of CO_2, are now emerging".

Funding Sources and Mechanisms

CCS projects access funding from various sources, reflecting their complex risk profiles and the evolving market landscape:

- **Government grants and subsidies**: Programs such as the EU Innovation Fund, the U.S. Department of Energy's initiatives, and various national schemes provide capital support that improves project economics and reduces investment risks.
- **Tax incentives**: Particularly the enhanced 45Q credits in the United States, which create revenue streams that can support project economics and attract private investment.
- **Private equity and venture capital**: Increasingly active in the CCS space, particularly for technology developers and specialised service providers attracted by the substantial growth potential.
- **Corporate investment**: Driven by strategic considerations beyond immediate financial returns, including emissions reduction commitments and positioning for advantage in carbon-constrained markets.
- **Carbon markets**: Both compliance-based and voluntary, representing a growing funding source for CCS projects as carbon prices increase and standards for carbon removal credits develop.

Conclusions

The global Carbon Capture and Storage market stands at a pivotal moment in its development, with significant growth potential as climate imperatives strengthen and technology matures. Current projections indicate expansion from approximately USD 5.47bn in 2025 to USD 20.59bn by 2035, representing a compound annual growth rate of 14.2%.

Several key trends are shaping the future of CCS through 2035:

- **Integration with broader climate strategies**: CCS will increasingly be viewed as a complementary approach alongside renewable energy, efficiency improvements, and nature-based solutions.
- **Specialisation and value chain maturation**: The emergence of dedicated service providers across the CCS ecosystem will accelerate innovation and cost reduction.
- **Internationalisation of CCS markets**: Cross-border CO_2 transport and international standards for carbon accounting will create global markets for carbon removal credits and technology exports.

Despite facing challenges including high capital costs, infrastructure limitations, and policy uncertainty, CCS represents a critical technology in the global response to climate change. It offers a pathway to deep decarbonisation while maintaining economic stability and energy security, particularly in hard-to-abate sectors.

About EPI Group

EPI Group is a leading provider of specialist geoscience, environmental and technical services for a wide range of industries. Established in 1987, our passionate, practical and highly knowledgeable team has been delivering independent, intelligent, and commercial solutions for clients for decades.

EPI Group operates worldwide, headquartered in the United Kingdom, with representative offices in North America, Europe, and Asia Pacific. Our reach for projects is global.

We deliver specialist technical solutions and serve as a collaborative workforce partner. Our services are locally delivered by a team of highly experienced technical experts, problem solvers and value creators, supplemented by a trusted network of associate consultants.

EPI Group specialises in supporting both the hydrocarbon and renewable energy sectors, but our experience also extends to mining and capital infrastructure projects.

Contact our team to discuss how we can support your capital projects worldwide.

EPI's CCS services

EPI Group delivers comprehensive support to the CCS market, providing end-to-end geoscience and monitoring solutions across the entire CO_2 storage lifecycle. Our expertise spans initial site evaluation, risk assessment, and capacity analysis, through to the design of seismic surveys and quality control for imaging CO_2 storage reservoirs. We identify potential risks such as leakage pathways via faults, fractures, or legacy wells, and develop robust injection and monitoring plans to ensure safe, efficient, and sustainable storage.

Operating worldwide, our multidisciplinary team integrates knowledge from gas storage, seismology, oil and gas, and hydrology, enabling us to implement advanced monitoring strategies including time-lapse seismic, borehole pressure monitoring, geochemical analysis, microseismic networks, and remote sensing.

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Gehrig has extensive international experience in geophysical and geological technical and business management across the energy sector, having served as a line manager, board member, and CEO of both operating companies and service contractors. A qualified Geophysical Engineer, with a doctorate in geophysics, he is a recognised expert in geophysical acquisition and processing. Gehrig specialises in imaging complex structural areas and has overseen hundreds of 3D seismic surveys, contributing expertise in seismic design, planning, execution, quality assurance, and interpretation.

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