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Global Carbon Capture Transport Pipeline Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Carbon Capture Transport Pipeline market size is expected to reach $ 7291 million by 2032, rising at a market growth of 16.4% CAGR during the forecast period (2026-2032).

Carbon Capture Transport Pipeline refers to an onshore or offshore pipeline system within the carbon capture, utilization and storage value chain that continuously transports carbon dioxide captured from industrial production, oil and gas processing, power generation, low-carbon hydrogen and ammonia production, bioenergy, waste management or direct air capture facilities, following dehydration, purification, compression and pressurization, from the custody transfer point of a capture facility to a gathering hub, utilization facility or custody transfer point at a geological storage site. The system includes gathering pipelines, trunk pipelines, laterals and delivery pipelines, together with directly associated valves, fittings, compression and boosting facilities, metering equipment, pressure-relief and isolation devices, leak-detection systems and pipeline integrity management facilities. It may transport carbon dioxide in gaseous, dense or liquid phase and may be configured as a point-to-point pipeline, a shared cluster network or a regional trunk network.

Key Findings

North America remains the largest established market because of its extensive operating carbon dioxide pipeline network

Engineering and construction services currently represent the largest revenue segment as new transport networks enter implementation

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Shared cluster networks are replacing isolated point-to-point projects as the preferred model for new infrastructure

Oil and gas processing forms the established demand base while cement hydrogen and power drive new projects

European offshore storage networks and cross-border carbon dioxide infrastructure are creating the strongest emerging opportunities

Market Trends

Carbon Capture Transport Pipeline is transitioning from dedicated pipelines connecting a single source with an enhanced oil recovery site toward multi-user networks linking industrial clusters with permanent geological storage. New projects increasingly adopt shared gathering systems, oversized trunk pipelines, standardized connection specifications and open-access operating models, allowing additional emitters to connect after initial commissioning. Dense-phase transport remains the preferred configuration for high-capacity, long-distance pipelines, while gaseous-phase systems retain relevance for smaller gathering networks and liquid-phase solutions are being assessed for selected offshore and integrated transport chains. Technology development is concentrating on impurity management, fracture control, decompression modelling, corrosion resistance, leak detection, automated isolation and real-time integrity monitoring. Offshore projects are also creating demand for high-strength line pipe, flexible pipeline products and thermoplastic composite connections. Repurposing of existing hydrocarbon pipelines is gaining attention, but qualification is moving toward asset-specific assessment rather than general conversion assumptions. Commercially, the sector is evolving from equipment-oriented contracting toward integrated transportation services supported by long-term capacity reservations, regulated returns, take-or-pay arrangements and government-backed risk-sharing mechanisms.

Market Dynamics

Drivers

The principal market driver is the growing number of carbon capture projects moving from planning into construction and operation. The Global CCS Institute reported 77 operating projects and 47 projects under construction in 2025, expanding the

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requirement for gathering lines, regional trunk infrastructure and storage-site delivery pipelines. Policy support in the United States, European carbon-management regulation, national CCUS cluster programs and decarbonization commitments in China, Canada and the Middle East are improving project bankability. Demand is reinforced by cement, lime, steel, chemicals, refining and hydrogen production, where process emissions are difficult to eliminate through electrification alone. Shared transportation infrastructure reduces duplication and can lower unit transport costs by aggregating carbon dioxide from multiple sources, improving the economic case for both large anchor emitters and smaller industrial facilities.

Restraints

Market development is restrained by high initial capital requirements, long permitting periods and uncertainty over the timing and volume of connected carbon sources. A pipeline designed ahead of demand may operate below capacity during its early years, while undersized infrastructure can require expensive expansion after additional emitters connect. Project economics also depend on synchronized development across capture, transport and storage; delays at any part of the chain can postpone revenue for the entire system. Public concerns regarding pipeline routing and safety, fragmented regulatory treatment of carbon dioxide streams, unclear cross-border liability and limited long-term transportation tariff visibility can further delay final investment decisions. Smaller or geographically dispersed emitters may remain uneconomic where a shared gathering network is unavailable.

Opportunities

The largest opportunity lies in developing cluster and shared pipeline networks around ports, industrial corridors and geological storage basins. Europe is moving toward a unified market for carbon dioxide transport and storage services, creating opportunities for cross-border offshore networks in the North Sea and adjacent industrial regions. The European Union targets at least 50 million tonnes of annual carbon dioxide injection capacity by 2030, which requires corresponding collection and transportation capacity. Further opportunities arise from repurposing technically suitable natural gas pipelines, expanding established North American networks beyond enhanced oil recovery, connecting low-carbon hydrogen and ammonia projects, and developing carbon-removal infrastructure for bioenergy and direct air capture. Suppliers can also generate recurring revenue from inspection, digital monitoring, integrity management, compressor upgrades and network-capacity expansion.

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Challenges

The primary technical challenge is maintaining safe and reliable transport under variable carbon dioxide composition, pressure, temperature and flow conditions. Water, oxygen, hydrogen sulfide, nitrogen and other impurities can affect phase behaviour, corrosion, compression requirements and fracture propagation, requiring clearly defined stream specifications across all connected emitters. Shared networks must also manage intermittent supply, pressure interactions and changing injection availability without disrupting upstream capture facilities. Repurposed pipelines require detailed assessment of materials, welds, fatigue history, pressure rating, valves and emergency isolation systems. Commercial challenges include allocating capacity among users, setting transparent tariffs, defining responsibility for off-specification carbon dioxide and coordinating network expansion with uncertain capture-project schedules. A shortage of harmonized cross-border standards and experienced engineering resources may become more visible as multiple regional networks proceed simultaneously.

Industry Chain Analysis

The upstream segment comprises steel plate, line-pipe steel, corrosion-resistant alloys, polymers, reinforcing fibres, valves, fittings, seals, compressors, pumps, metering instruments, sensors, control systems and leak-detection technologies. Midstream participants manufacture seamless and welded line pipe, flexible pipe and thermoplastic composite pipe; provide engineering, procurement, construction, offshore installation, testing and certification; and own or operate gathering networks and trunk pipelines. The value created at this stage depends on material qualification, pressure and phase design, route engineering, compression efficiency, system availability and long-term integrity performance. Downstream customers include oil and gas processors, power producers, hydrogen and ammonia developers, cement and steel groups, refiners, chemical companies, fertilizer producers and carbon-removal operators. Geological storage and utilization terminals establish receiving specifications and injection schedules that directly influence pipeline design and operation. Long-term value is shifting toward operators and service providers capable of coordinating multiple sources, managing capacity and delivering reliable custody transfer under multi-user contracts.

Segment Insights

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By business category, Engineering and Construction Services currently represents the largest segment because most emerging carbon dioxide networks remain in the design, construction or commissioning stage. Pipeline Products and Equipment covers steel line pipe, flexible and composite pipe, valves, compression equipment, metering, monitoring and directly associated components. Pipeline Transportation and Operation Services is expected to become increasingly important as shared networks enter commercial operation and generate recurring capacity, connection and throughput revenue. Others primarily covers inspection, certification, technical assurance, integrity management and specialized digital monitoring services.

By Pipeline Network Structure, Point-to-Point Pipeline remains important for projects with one anchor source and one clearly defined utilization or storage destination. Cluster and Shared Pipeline Network is becoming the principal development model for industrial regions because it aggregates multiple carbon sources and spreads infrastructure costs across users. Regional Trunk Pipeline Network represents the longer-term infrastructure layer, connecting several industrial clusters, collection hubs and storage basins through high-capacity corridors. By Project Development Type, New-Build Pipeline dominates current investment because most emerging storage hubs require dedicated carbon dioxide infrastructure. Repurposed Pipeline can reduce construction requirements where existing assets meet technical and routing conditions, while Pipeline Expansion and Upgrade will grow as operating networks add emitters, laterals, compressor capacity and new storage destinations.

Downstream Market Opportunities

Oil and Gas Processing remains the most established application, supported by concentrated carbon dioxide streams and existing transportation experience. Power Generation can provide high and relatively continuous throughput, making captured-power projects potential anchor users for regional networks. Low-Carbon Hydrogen and Ammonia Production offers another scalable source because reforming and gasification processes can generate concentrated carbon dioxide streams. Cement, Lime and Iron & Steel are strategically important because a substantial portion of their emissions is process-related and difficult to eliminate through fuel substitution alone. Refining, Chemicals and Fertilizers benefit from integration within industrial clusters where several capture units can share gathering and compression infrastructure. Others includes bioethanol, bioenergy with carbon capture and storage, waste-to-energy, direct air capture and additional industrial sources, creating opportunities for negative-emission transport services and smaller network connections.

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Regional Insights

North America is the largest established regional market, led by the United States' extensive carbon dioxide pipeline experience and supplemented by Canadian trunk and storage projects. The region combines existing enhanced oil recovery infrastructure with an expanding pipeline of dedicated geological storage projects. Gulf Coast industrial concentration, suitable storage resources and policy incentives support new networks serving refining, chemicals, hydrogen, ammonia, power and direct air capture. However, permitting, route opposition and differences between federal and state regulation remain important project risks.

Europe is the most active emerging market for shared and cross-border transportation systems. North Sea storage resources are driving onshore gathering networks and offshore trunk pipelines in the Netherlands, Norway, the United Kingdom, Belgium, Denmark, France, Germany and Italy. China is developing carbon dioxide transportation around oilfields, coal-chemical facilities, power plants and industrial demonstration projects, with domestic steel-pipe and energy-equipment suppliers supporting localization. The Middle East is positioned for growth through natural gas processing, low-carbon hydrogen and ammonia and depleted-reservoir storage. Asia-Pacific development outside China is more selective, with projects concentrated in Australia, Japan, South Korea and Southeast Asian storage hubs.

Competitive Landscape Analysis

The competitive landscape is fragmented across pipeline operators, engineering contractors, equipment suppliers and line-pipe manufacturers rather than controlled by one type of company. ExxonMobil, Kinder Morgan, Enbridge, Gasunie and Fluxys compete primarily through network ownership, project development, capacity aggregation and transportation operation. Saipem and Technip Energies provide engineering and construction capabilities, while Baker Hughes, Linde, Air Products and NOV participate through compression, process integration, pipeline systems or broader carbon-management solutions. Tenaris, Vallourec, EUROPIPE, Welspun Corp, Corinth Pipeworks, Mannesmann Line Pipe, AMERICAN Steel Pipe and CNPC Bohai Equipment Manufacturing compete in qualified line pipe and associated products; Strohm addresses specialized offshore transport through thermoplastic composite pipe. DNV contributes technical assurance, qualification and integrity expertise. Future

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differentiation will depend on proven carbon dioxide service qualification, fracture and impurity management, offshore installation capability, network-operating experience and the ability to support projects from front-end design through long-term operation.

Report Scope

This report studies the global Carbon Capture Transport Pipeline demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Carbon Capture Transport Pipeline, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Carbon Capture Transport Pipeline that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Carbon Capture Transport Pipeline total market, 2021-2032, (USD Million)

Global Carbon Capture Transport Pipeline total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Carbon Capture Transport Pipeline total market, key domestic companies, and share, (USD Million)

Global Carbon Capture Transport Pipeline revenue by player, revenue and market share 2021-2026, (USD Million)

Global Carbon Capture Transport Pipeline total market by Type, CAGR, 2021-2032, (USD Million)

Global Carbon Capture Transport Pipeline total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Carbon Capture Transport Pipeline

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market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ExxonMobil, Kinder Morgan, Saipem, Baker Hughes, Linde, Tenaris, Air Products, Gasunie, Enbridge, Technip Energies, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Carbon Capture Transport Pipeline market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Carbon Capture Transport Pipeline Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Carbon Capture Transport Pipeline Market, Segmentation by Type:

Pipeline Products and Equipment

Engineering and Construction Services

Pipeline Transportation and Operation Services

Others

Global Carbon Capture Transport Pipeline Market, Segmentation by Pipeline Network Structure:

Point-to-Point Pipeline

Cluster and Shared Pipeline Network

Regional Trunk Pipeline Network

Global Carbon Capture Transport Pipeline Market, Segmentation by Project Development Type:

New-Build Pipeline

Repurposed Pipeline

Pipeline Expansion and Upgrade

Global Carbon Capture Transport Pipeline Market, Segmentation by Application:

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Oil and Gas Processing

Power Generation

Low-Carbon Hydrogen and Ammonia Production

Cement, Lime and Iron & Steel

Refining, Chemicals and Fertilizers

Others

Companies Profiled:

ExxonMobil

Kinder Morgan

Saipem

Baker Hughes

Linde

Tenaris

Air Products

Gasunie

Enbridge

Technip Energies

NOV

Fluxys

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Vallourec

EUROPIPE

Welspun Corp

Corinth Pipeworks

DNV

Mannesmann Line Pipe

AMERICAN Steel Pipe

Strohm

CNPC Bohai Equipment Manufacturing

Key Questions Answered

1. How big is the global Carbon Capture Transport Pipeline market?
2. What is the demand of the global Carbon Capture Transport Pipeline market?
3. What is the year over year growth of the global Carbon Capture Transport Pipeline market?
4. What is the total value of the global Carbon Capture Transport Pipeline market?
5. Who are the Major Players in the global Carbon Capture Transport Pipeline market?
6. What are the growth factors driving the market demand?

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