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

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Abstracts

The global Carbon Storage Transport Pipeline market size is expected to reach $ 5904 million by 2032, rising at a market growth of 19.1% CAGR during the forecast period (2026-2032).

Carbon Storage Transport Pipeline refers to a dedicated pipeline system within the carbon capture 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 the custody transfer point of an onshore or offshore geological storage site. The system comprises inlet compression facilities, gathering lines, trunk pipelines, laterals and delivery pipelines, intermediate booster facilities, and directly associated valves, fittings, cooling and pressure-control equipment, metering equipment, pressure-relief and isolation devices, leak-detection systems, control systems and pipeline integrity management facilities. It may transport carbon dioxide in gaseous, dense, supercritical or liquid phase and may be configured as a point-to-point pipeline, a shared cluster network or a regional trunk network.

Key Findings

Shared transport networks are becoming the preferred infrastructure model for connecting industrial clusters with permanent geological storage

Engineering and construction services represent the largest segment as major storage networks move into project execution

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New-build pipelines dominate current investment while repurposing remains dependent on detailed asset qualification

Europe leads emerging offshore storage pipeline construction around the North Sea and adjacent industrial regions

Cement hydrogen power and carbon removal projects are expanding the future customer base for storage transportation

Market Trends

Carbon Storage Transport Pipeline is moving from individually configured source-to-storage links toward multi-user infrastructure connecting industrial clusters with shared geological storage capacity. New networks increasingly use standardized carbon dioxide specifications, open-access connection rules, oversized trunk lines and modular compression capacity to accommodate additional emitters after initial commissioning. Dense and supercritical transport remain central to high-volume, long-distance systems, while gaseous pipelines are used in smaller gathering networks and liquid-phase pipelines support selected terminal and offshore configurations. Technology development is focused on impurity control, dehydration, fracture arrest, decompression behaviour, low-temperature material performance, corrosion resistance, automated isolation and real-time leak detection. Offshore storage projects are increasing demand for high-strength steel line pipe, subsea construction, flexible connections and thermoplastic composite products. Repurposing existing hydrocarbon pipelines is gaining attention where routes align with storage sites, but conversion decisions increasingly require asset-specific material, weld, fatigue and pressure assessments. Commercially, the sector is developing around regulated transport and storage companies, long-term capacity reservations, connection charges, take-or-pay contracts and government-backed revenue support.

Market Dynamics

Drivers

Growth is primarily driven by the transition of carbon capture projects from demonstration into industrial clusters with dedicated geological storage. Decarbonization requirements in cement, lime, steel, refining, chemicals and hydrogen

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production are creating concentrated carbon dioxide streams that require reliable transport to saline formations and depleted oil and gas reservoirs. Government-supported cluster programs in Europe, policy incentives in North America and emerging storage strategies in China, Australia and the Middle East are improving project bankability. The European Union’s objective of establishing at least 50 million tonnes of annual carbon dioxide injection capacity by 2030 requires corresponding gathering and trunk transportation infrastructure. Shared pipelines also reduce duplication and lower unit transportation costs by aggregating several emitters, making permanent storage more accessible to facilities that could not economically support a dedicated pipeline.

Restraints

The market is restrained by high upfront capital requirements, long permitting and route-development periods, and uncertainty over the timing and volume of connected capture projects. Storage pipelines are exposed to cross-chain risk because transport revenue depends on capture facilities, pipeline infrastructure and geological storage capacity becoming available on compatible schedules. Early construction of oversized networks can result in low initial utilization, while conservative capacity design may require expensive expansion after additional users connect. Storage licensing, long-term liability, cross-border carbon dioxide accounting and transportation tariff frameworks remain incomplete in several markets. Public concern regarding pipeline safety and routing can delay approvals, particularly where dense-phase pipelines cross populated areas. Smaller and geographically dispersed emitters may remain commercially unattractive without access to a shared gathering network.

Opportunities

The largest opportunity lies in developing open-access transport networks around industrial ports, high-emission corridors and proven storage basins. North Sea projects are creating demand for onshore gathering systems, coastal compression facilities and offshore trunk pipelines linking emitters in several countries with shared storage sites. Further opportunities arise from converting technically suitable natural gas pipelines, expanding storage networks with new laterals and compressor stations, and connecting bioenergy and direct air capture projects that require permanent storage to deliver durable carbon removal. North American networks can progressively shift from enhanced oil recovery-oriented infrastructure toward dedicated saline storage services, while China and the Middle East can integrate storage pipelines with refining, coal-chemical, gas-processing, hydrogen and ammonia projects. Recurring opportunities will

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develop in pipeline inspection, carbon dioxide quality monitoring, integrity management, digital flow assurance, leak detection and capacity optimization.

Challenges

The principal technical challenge is transporting carbon dioxide safely under changing composition, pressure, temperature and flow conditions. Water, oxygen, hydrogen sulfide, nitrogen, sulfur oxides and other impurities can alter phase behaviour, increase corrosion risk and affect compression, metering and fracture propagation. Multi-user networks therefore require enforceable carbon dioxide quality specifications and clear responsibility for off-specification streams. Intermittent supply and changing storage-site injection availability must be managed without disrupting connected capture facilities. Offshore pipelines face additional requirements related to seabed conditions, installation loads, external pressure, corrosion protection and intervention access. Repurposed pipelines require detailed requalification of materials, welds, valves, pressure ratings and emergency isolation systems. Commercial challenges include allocating capacity among users, coordinating network expansion, setting transparent tariffs and maintaining viable project economics during the early period of low utilization.

Industry Chain Analysis

The upstream segment comprises line-pipe steel, steel plate, corrosion-resistant alloys, polymers, reinforcing fibres, valves, fittings, seals, compressors, pumps, coolers, metering instruments, sensors, control systems and leak-detection technologies. Midstream participants manufacture seamless and welded line pipe, flexible pipe and composite pipe; provide front-end engineering, procurement, construction, offshore installation, commissioning, inspection and certification; and develop or operate gathering networks and trunk pipelines. Value creation depends on material qualification, carbon dioxide conditioning, hydraulic 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 and fertilizer producers, waste-management companies and engineered carbon-removal operators. Geological storage operators establish receiving specifications and injection schedules that directly influence pipeline design and operation. Operators capable of coordinating multiple emitters, allocating capacity and maintaining reliable custody transfer under long-term contracts occupy an increasingly important position in the

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industry chain.

Segment Insights

By business category, Engineering and Construction Services currently represents the largest segment because several major storage transportation networks are in the design, procurement, construction or commissioning phase. Pipeline Products and Equipment covers steel line pipe, flexible and composite pipe, valves, compression and boosting equipment, metering systems, monitoring technologies and directly associated components. Pipeline Transportation and Operation Services will increase in importance as dedicated storage networks commence commercial operation and generate recurring capacity, connection and throughput revenue. Others primarily covers technical assurance, testing, certification, carbon dioxide quality management, inspection and integrity services.

By Pipeline Network Structure, Point-to-Point Pipeline remains relevant for one anchor emitter connected to one defined geological store. Cluster and Shared Pipeline Network is becoming the principal development model for ports and industrial regions because it aggregates several carbon sources and spreads infrastructure costs across multiple users. Regional Trunk Pipeline Network represents the longer-term infrastructure layer connecting several clusters, gathering hubs and storage basins through high-capacity corridors. By Project Development Type, New-Build Pipeline dominates current activity because most emerging storage hubs require dedicated carbon dioxide infrastructure. Repurposed Pipeline can reduce construction requirements where existing assets satisfy route, material and pressure conditions, while Pipeline Expansion and Upgrade will grow as operating networks add emitters, laterals, compression capacity and storage destinations.

Downstream Market Opportunities

Oil and Gas Processing provides concentrated carbon dioxide streams and relevant pipeline operating experience, but market growth is shifting toward dedicated geological storage rather than utilization-led transportation. Power Generation can provide large and relatively stable throughput, making capture-equipped power plants potential anchor users for regional networks. Low-Carbon Hydrogen and Ammonia Production offers scalable volumes from reforming and gasification processes. Cement, Lime and Iron & Steel are strategically important because significant emissions arise from process chemistry and cannot be eliminated solely through fuel substitution. Refining, Chemicals and Fertilizers benefit from integration within industrial clusters where several capture

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units can share compression and gathering infrastructure. Others includes bioethanol, bioenergy with carbon capture and storage, waste-to-energy and direct air capture, which create demand for permanent storage pipelines supporting negative-emission services.

Regional Insights

Europe is the most active emerging market for dedicated carbon storage transportation, led by North Sea storage development and government-supported industrial clusters. The Netherlands, Norway, the United Kingdom, Belgium, Denmark, France, Germany and Italy are developing onshore gathering networks, coastal hubs and offshore trunk pipelines. Porthos, Northern Lights, Northern Endurance Partnership, HyNet and related projects are establishing technical specifications and commercial models for multi-user transport and storage. Cross-border infrastructure is also encouraging standardized carbon dioxide quality, third-party access and regulated transportation arrangements.

North America combines the world’s largest established carbon dioxide pipeline base with a growing portfolio of dedicated geological storage projects, particularly along the United States Gulf Coast and in western Canada. China is developing pipeline transportation around oilfields, coal-chemical facilities, power plants and industrial demonstration projects, supported by domestic steel-pipe and energy-equipment manufacturing. The Middle East has potential in natural gas processing and low-carbon hydrogen and ammonia, while Australia and Southeast Asia are evaluating offshore storage hubs capable of serving domestic and cross-border carbon dioxide sources. Regional growth will depend on storage licensing, source-to-sink coordination and long-term transport tariffs.

Competitive Landscape Analysis

Competition is distributed across network developers, engineering contractors, equipment suppliers, line-pipe manufacturers and technical-assurance companies. ExxonMobil, Enbridge, Gasunie and Fluxys participate through transport-network development, carbon-source aggregation and future operating services, while Kinder Morgan brings extensive carbon dioxide pipeline experience but must separate dedicated storage activities from its established enhanced oil recovery business. Saipem and Technip Energies compete in front-end engineering, pipeline construction and offshore installation. Baker Hughes, Linde, Air Products and NOV supply

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compression, conditioning, monitoring or pipeline-system technologies. 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, while Strohm addresses specialized offshore transportation with thermoplastic composite pipe. DNV provides qualification, certification and integrity assurance. Competitive differentiation increasingly depends on proven carbon dioxide qualification, offshore capability, fracture and impurity management, multi-user network operation and lifecycle service coverage.

Report Scope

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

This report is a detailed and comprehensive analysis of the world market for Carbon Storage 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 Storage Transport Pipeline that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

This report profiles major players in the global Carbon Storage Transport Pipeline 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 Storage 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 Storage Transport Pipeline Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

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India

Rest of World

Market Segmentation

Global Carbon Storage Transport Pipeline Market, Segmentation by Type:

Pipeline Products and Equipment

Engineering and Construction Services

Pipeline Transportation and Operation Services

Others

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

Point-to-Point Pipeline

Cluster and Shared Pipeline Network

Regional Trunk Pipeline Network

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

New-Build Pipeline

Repurposed Pipeline

Pipeline Expansion and Upgrade

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Global Carbon Storage Transport Pipeline Market, Segmentation by Application:

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

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NOV

Fluxys

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

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