

Global CO₂ Recovery System Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global CO₂ Recovery System market size was valued at US\$ 360 million in 2025 and is forecast to a readjusted size of US\$ 986 million by 2032 with a CAGR of 14.7% during review period.

A CO₂ Recovery System is a turnkey set of equipment that uses CO₂-containing gas as feedstock and separates CO₂ from mixed gases through process units such as compression, cooling, absorption/adsorption, membrane separation, or cryogenic condensation, while completing dehydration, impurity removal, and purity upgrading, ultimately producing gaseous CO₂, liquid CO₂, or dry ice that can be directly stored, transported, or used. The system is mainly deployed in applications including fermentation and food & beverage, high-concentration process gas and by-product/off-gas streams, biogas and biomethane upgrading, and flue-gas recovery. Its core value lies in converting dispersed or low-value carbon-containing gas streams into marketable CO₂ products, enabling both resource utilization and emissions reduction. In 2025, global output of CO₂ recovery systems reached 973 units, with an average selling price of USD 359.8 thousand per unit.

The carbon dioxide (CO₂) recovery system industry uses CO₂-containing gases as feedstock and delivers gaseous CO₂, liquid CO₂, or dry ice through modules for separation, dehydration, impurity removal, and productization. It mainly serves fermentation and food & beverage, high-concentration process gas and by-product/off-gas streams, biogas and biomethane upgrading, and flue-gas recovery. The industry combines characteristics of industrial gas equipment and process separation equipment, with demand driven jointly by “resource utilization (cost reduction and supply assurance)” and “emissions constraints (compliance and demonstration).” Food-

grade supply security and distributed recovery continue to support steady installations of small-to-mid-size systems; high-concentration by-product/off-gas applications in chemicals, refining, and hydrogen value chains place greater emphasis on continuous operation and tight coupling with upstream units; flue-gas recovery is more sensitive to policy intensity, demonstration project cadence, and financing conditions, so orders tend to be project-based with phased and clustered deliveries.

From a regional perspective, Europe and North America have more mature value chains in food-grade recovery and biomethane upgrading, and projects tend to be delivered in a more standardized and modular manner. Japan is dominated by demonstration-oriented projects and refined applications under specific operating conditions. China is seeing faster growth in project density in by-product gas resource utilization and industrial-park scenarios. Regional differences are largely determined by emissions regulation, food-grade standards systems, CO₂ logistics radius, and supply-resilience requirements, which in turn shape system form factors (fixed installations vs. skid-mounted/containerized), product forms (gas/liquid/dry ice), and redundancy configuration levels. The competitive landscape features the coexistence of “international turnkey brands + regional manufacturers + niche application specialists,” with competition focused on energy consumption metrics, recovery rate and purity stability, lead time and localized service capability, and long-term operational reliability and reputation.

In terms of product structure and technology pathways, systems can be classified by output form into gaseous recovery systems, liquefaction recovery systems, and integrated dry-ice systems; and by core separation mechanism into chemical absorption, physical adsorption, membrane separation, and compression–condensation/cryogenic separation. In practice, most solutions adopt a combined architecture of “separation + compression + drying + purification + liquefaction/dry-ice production.” By application, fermentation and food & beverage emphasize food-grade impurity-spectrum control and stability; high-concentration process gas and by-product/off-gas emphasize continuity and system coupling; biogas upgrading emphasizes modularity, footprint, and ease of O&M; flue-gas recovery emphasizes economics and scalable capacity under high-flow, low-concentration conditions. Cost structure typically consists of the core separation unit, compression and refrigeration, drying and purification, storage and packaging, control systems, and skid piping/valves/instrumentation. Among these, compression/refrigeration and process equipment account for the largest share of the BOM, while valves/instrumentation and long-lead items significantly affect delivery lead times.

On the manufacturing side, “single-line capacity” is strongly constrained by the level of standardization and the project-based nature of deliveries, and is generally limited. For standardized skid-mounted/containerized small-to-mid systems, single-line capacity is 10–30 sets delivered per year. For larger, more customized systems with higher non-standard content and more complex operating conditions, single-line capacity is 3–10 sets per year. For large flue-gas recovery units, project cycles are longer and design changes and interface coordination are heavier; a cadence of one set delivered every 1–3 years per line is more common. Gross margins show clear tiering: turnkey systems for food & beverage and fermentation recovery are 28%–42%; integrated dry-ice systems are 25%–38%; high-concentration process gas and by-product/off-gas recovery systems are 22%–35%; biogas-upgrading-related equipment is 20%–33%; and flue-gas recovery systems are 15%–28%. The equipment-side weighted average gross margin for the industry is 22%–34%. In the value chain, upstream includes compressors and refrigeration packages, heat exchangers and cold boxes, columns and packing, membrane materials and adsorbents, valves/instrumentation and control systems; midstream comprises turnkey system suppliers and integrated manufacturers; downstream end users include food & beverage, chemicals and refining, industrial gas companies, and biogas operators. Going forward, key trends will center on standardized skid packages, energy efficiency and heat-integration optimization, digital control and remote O&M compatibility, and continued productization of integrated liquefaction/dry-ice offerings. On the demand side, adoption will deepen in distributed resource-utilization and industrial-park scenarios, while flue-gas recovery is expected to move toward more stable commercial deliveries as demonstration experience accumulates and costs decline.

This report is a detailed and comprehensive analysis for global CO₂ Recovery System market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global CO₂ Recovery System market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (K US\$/Unit), 2021-2032

Global CO₂ Recovery System market size and forecasts by region and country, in

consumption value (\$ Million), sales quantity (K Units), and average selling prices (K US\$/Unit), 2021-2032

Global CO2 Recovery System market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (K US\$/Unit), 2021-2032

Global CO2 Recovery System market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for CO2 Recovery System
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global CO2 Recovery System market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Asco Carbon Dioxide, Mitsubishi Heavy Industries, Bright Biomethane, GEA, Linde Engineering, Sumitomo Seika, Shell Cansolv, Cold Jet, Kinder Morgan, Fluor Corporation, etc.

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

Market Segmentation

CO2 Recovery System market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Chemical Absorption

Physical Adsorption

Membrane Separation

Compression and Condensation

Others

Market segment by Form Factor

Stationary

Mobile

Market segment by Inlet CO₂ Concentration

High Concentration

Low Concentration

Market segment by Application

Flue Gas CO₂ Recovery (SGR)

Process/By-product Gas CO₂ Recovery (BPR)

Dry Ice Production and Related CO₂ Recovery

Fermentation and Food and Beverage CO₂ Recovery

Others

Major players covered

Asco Carbon Dioxide

Mitsubishi Heavy Industries

Bright Biomethane

GEA

Linde Engineering

Sumitomo Seika

Shell Cansolv

Cold Jet

Kinder Morgan

Fluor Corporation

Gulf Cryo

Super Cryogenic Systems

Pentair Haffmans

Chart Industries

Air Water

Taiyo Nippon Sanso

JFE Engineering

Mitsubishi Kakoki

JCCL

Kawasaki Heavy Industries

PRODEVAL

Steinecker

Mellcon Engineers Pvt.

Ashirwad Carbonics (India) Pvt Ltd.

COMTECSWISS AG

Separeco

Supercryo

Solveno Technologies

Steinecker GmbH

Tecno Project Industriale

Corosys

Hypro

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe CO2 Recovery System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of CO2 Recovery System, with price, sales quantity, revenue, and global market share of CO2 Recovery System from 2021 to 2026.

Chapter 3, the CO2 Recovery System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the CO2 Recovery System breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and CO2 Recovery System market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of CO2 Recovery System.

Chapter 14 and 15, to describe CO2 Recovery System sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Struture

1.3.1 Overview: Global Application-Specific AI Chip Consumption Value by Struture:
2021 Versus 2025 Versus 2032

1.3.2 VPU

1.3.3 TPU

1.3.4 NPU

1.3.5 DPU

1.4 Market Analysis by Precision

1.4.1 Overview: Global Application-Specific AI Chip Consumption Value by Precision:
2021 Versus 2025 Versus 2032

1.4.2 High Precision

1.4.3 Low Precision

1.4.4 Mixed Precision

1.5 Market Analysis by End Use

1.5.1 Overview: Global Application-Specific AI Chip Consumption Value by End Use:
2021 Versus 2025 Versus 2032

1.5.2 Data Center AI ASIC

1.5.3 Edge AI ASIC

1.5.4 On-device AI

1.6 Market Analysis by Application

1.6.1 Overview: Global Application-Specific AI Chip Consumption Value by
Application: 2021 Versus 2025 Versus 2032

1.6.2 AI Data Center

1.6.3 Edge Computing

1.6.4 Consumer Electronics

1.6.5 IOT

1.6.6 Autonomous Driving

1.6.7 Others

1.7 Global Application-Specific AI Chip Market Size & Forecast

1.7.1 Global Application-Specific AI Chip Consumption Value (2021 & 2025 & 2032)

1.7.2 Global Application-Specific AI Chip Sales Quantity (2021-2032)

1.7.3 Global Application-Specific AI Chip Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 NVIDIA

2.1.1 NVIDIA Details

2.1.2 NVIDIA Major Business

2.1.3 NVIDIA Application-Specific AI Chip Product and Services

2.1.4 NVIDIA Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 NVIDIA Recent Developments/Updates

2.2 Zhongke Yusur (Beijing)

2.2.1 Zhongke Yusur (Beijing) Details

2.2.2 Zhongke Yusur (Beijing) Major Business

2.2.3 Zhongke Yusur (Beijing) Application-Specific AI Chip Product and Services

2.2.4 Zhongke Yusur (Beijing) Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Zhongke Yusur (Beijing) Recent Developments/Updates

2.3 MediaTek

2.3.1 MediaTek Details

2.3.2 MediaTek Major Business

2.3.3 MediaTek Application-Specific AI Chip Product and Services

2.3.4 MediaTek Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 MediaTek Recent Developments/Updates

2.4 ZTE

2.4.1 ZTE Details

2.4.2 ZTE Major Business

2.4.3 ZTE Application-Specific AI Chip Product and Services

2.4.4 ZTE Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 ZTE Recent Developments/Updates

2.5 Intel

2.5.1 Intel Details

2.5.2 Intel Major Business

2.5.3 Intel Application-Specific AI Chip Product and Services

2.5.4 Intel Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Intel Recent Developments/Updates

2.6 Broadcom

2.6.1 Broadcom Details

- 2.6.2 Broadcom Major Business
- 2.6.3 Broadcom Application-Specific AI Chip Product and Services
- 2.6.4 Broadcom Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.6.5 Broadcom Recent Developments/Updates
- 2.7 Marvell
 - 2.7.1 Marvell Details
 - 2.7.2 Marvell Major Business
 - 2.7.3 Marvell Application-Specific AI Chip Product and Services
 - 2.7.4 Marvell Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.7.5 Marvell Recent Developments/Updates
- 2.8 Meso-micro Semiconductor
 - 2.8.1 Meso-micro Semiconductor Details
 - 2.8.2 Meso-micro Semiconductor Major Business
 - 2.8.3 Meso-micro Semiconductor Application-Specific AI Chip Product and Services
 - 2.8.4 Meso-micro Semiconductor Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Meso-micro Semiconductor Recent Developments/Updates
- 2.9 AMD
 - 2.9.1 AMD Details
 - 2.9.2 AMD Major Business
 - 2.9.3 AMD Application-Specific AI Chip Product and Services
 - 2.9.4 AMD Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.9.5 AMD Recent Developments/Updates
- 2.10 Cambricon
 - 2.10.1 Cambricon Details
 - 2.10.2 Cambricon Major Business
 - 2.10.3 Cambricon Application-Specific AI Chip Product and Services
 - 2.10.4 Cambricon Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.10.5 Cambricon Recent Developments/Updates
- 2.11 Shanghai Yunsilicon
 - 2.11.1 Shanghai Yunsilicon Details
 - 2.11.2 Shanghai Yunsilicon Major Business
 - 2.11.3 Shanghai Yunsilicon Application-Specific AI Chip Product and Services
 - 2.11.4 Shanghai Yunsilicon Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.11.5 Shanghai Yunsilicon Recent Developments/Updates
- 2.12 NETINT Technologie(Shanghai)
 - 2.12.1 NETINT Technologie(Shanghai) Details
 - 2.12.2 NETINT Technologie(Shanghai) Major Business
 - 2.12.3 NETINT Technologie(Shanghai) Application-Specific AI Chip Product and Services
 - 2.12.4 NETINT Technologie(Shanghai) Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.12.5 NETINT Technologie(Shanghai) Recent Developments/Updates
- 2.13 Beijing Emergetech
 - 2.13.1 Beijing Emergetech Details
 - 2.13.2 Beijing Emergetech Major Business
 - 2.13.3 Beijing Emergetech Application-Specific AI Chip Product and Services
 - 2.13.4 Beijing Emergetech Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.13.5 Beijing Emergetech Recent Developments/Updates
- 2.14 Shenzhen Yunbao Intelligent
 - 2.14.1 Shenzhen Yunbao Intelligent Details
 - 2.14.2 Shenzhen Yunbao Intelligent Major Business
 - 2.14.3 Shenzhen Yunbao Intelligent Application-Specific AI Chip Product and Services
 - 2.14.4 Shenzhen Yunbao Intelligent Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.14.5 Shenzhen Yunbao Intelligent Recent Developments/Updates
- 2.15 Resnics Technology (Shanghai)
 - 2.15.1 Resnics Technology (Shanghai) Details
 - 2.15.2 Resnics Technology (Shanghai) Major Business
 - 2.15.3 Resnics Technology (Shanghai) Application-Specific AI Chip Product and Services
 - 2.15.4 Resnics Technology (Shanghai) Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.15.5 Resnics Technology (Shanghai) Recent Developments/Updates
- 2.16 Xinqiyuan Electronic Technology
 - 2.16.1 Xinqiyuan Electronic Technology Details
 - 2.16.2 Xinqiyuan Electronic Technology Major Business
 - 2.16.3 Xinqiyuan Electronic Technology Application-Specific AI Chip Product and Services
 - 2.16.4 Xinqiyuan Electronic Technology Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.16.5 Xinqiyuan Electronic Technology Recent Developments/Updates

2.17 Beijing Dayu Zhixin Technology

2.17.1 Beijing Dayu Zhixin Technology Details

2.17.2 Beijing Dayu Zhixin Technology Major Business

2.17.3 Beijing Dayu Zhixin Technology Application-Specific AI Chip Product and Services

2.17.4 Beijing Dayu Zhixin Technology Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.17.5 Beijing Dayu Zhixin Technology Recent Developments/Updates

2.18 Allwinner Technology

2.18.1 Allwinner Technology Details

2.18.2 Allwinner Technology Major Business

2.18.3 Allwinner Technology Application-Specific AI Chip Product and Services

2.18.4 Allwinner Technology Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.18.5 Allwinner Technology Recent Developments/Updates

2.19 Shenzhen Yuntian Lifei Technology

2.19.1 Shenzhen Yuntian Lifei Technology Details

2.19.2 Shenzhen Yuntian Lifei Technology Major Business

2.19.3 Shenzhen Yuntian Lifei Technology Application-Specific AI Chip Product and Services

2.19.4 Shenzhen Yuntian Lifei Technology Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.19.5 Shenzhen Yuntian Lifei Technology Recent Developments/Updates

2.20 Kalray

2.20.1 Kalray Details

2.20.2 Kalray Major Business

2.20.3 Kalray Application-Specific AI Chip Product and Services

2.20.4 Kalray Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.20.5 Kalray Recent Developments/Updates

2.21 Aojie Technology

2.21.1 Aojie Technology Details

2.21.2 Aojie Technology Major Business

2.21.3 Aojie Technology Application-Specific AI Chip Product and Services

2.21.4 Aojie Technology Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.21.5 Aojie Technology Recent Developments/Updates

2.22 Zhonghao Xinying (Hangzhou) Technology

2.22.1 Zhonghao Xinying (Hangzhou) Technology Details

- 2.22.2 Zhonghao Xinying (Hangzhou) Technology Major Business
- 2.22.3 Zhonghao Xinying (Hangzhou) Technology Application-Specific AI Chip Product and Services
- 2.22.4 Zhonghao Xinying (Hangzhou) Technology Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.22.5 Zhonghao Xinying (Hangzhou) Technology Recent Developments/Updates
- 2.23 Chengdu Beizhong Wangxin Technology
 - 2.23.1 Chengdu Beizhong Wangxin Technology Details
 - 2.23.2 Chengdu Beizhong Wangxin Technology Major Business
 - 2.23.3 Chengdu Beizhong Wangxin Technology Application-Specific AI Chip Product and Services
 - 2.23.4 Chengdu Beizhong Wangxin Technology Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.23.5 Chengdu Beizhong Wangxin Technology Recent Developments/Updates
- 2.24 Ruixin Microelectronics
 - 2.24.1 Ruixin Microelectronics Details
 - 2.24.2 Ruixin Microelectronics Major Business
 - 2.24.3 Ruixin Microelectronics Application-Specific AI Chip Product and Services
 - 2.24.4 Ruixin Microelectronics Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.24.5 Ruixin Microelectronics Recent Developments/Updates
- 2.25 Ruichuang Weina
 - 2.25.1 Ruichuang Weina Details
 - 2.25.2 Ruichuang Weina Major Business
 - 2.25.3 Ruichuang Weina Application-Specific AI Chip Product and Services
 - 2.25.4 Ruichuang Weina Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.25.5 Ruichuang Weina Recent Developments/Updates
- 2.26 Shanghai Fullhan Microelectronics
 - 2.26.1 Shanghai Fullhan Microelectronics Details
 - 2.26.2 Shanghai Fullhan Microelectronics Major Business
 - 2.26.3 Shanghai Fullhan Microelectronics Application-Specific AI Chip Product and Services
 - 2.26.4 Shanghai Fullhan Microelectronics Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.26.5 Shanghai Fullhan Microelectronics Recent Developments/Updates
- 2.27 Xinrun Technology
 - 2.27.1 Xinrun Technology Details
 - 2.27.2 Xinrun Technology Major Business

- 2.27.3 Xinrun Technology Application-Specific AI Chip Product and Services
- 2.27.4 Xinrun Technology Application-Specific AI Chip Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.27.5 Xinrun Technology Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: APPLICATION-SPECIFIC AI CHIP BY MANUFACTURER

- 3.1 Global Application-Specific AI Chip Sales Quantity by Manufacturer (2021-2026)
- 3.2 Global Application-Specific AI Chip Revenue by Manufacturer (2021-2026)
- 3.3 Global Application-Specific AI Chip Average Price by Manufacturer (2021-2026)
- 3.4 Market Share Analysis (2025)
 - 3.4.1 Producer Shipments of Application-Specific AI Chip by Manufacturer Revenue (\$MM) and Market Share (%): 2025
 - 3.4.2 Top 3 Application-Specific AI Chip Manufacturer Market Share in 2025
 - 3.4.3 Top 6 Application-Specific AI Chip Manufacturer Market Share in 2025
- 3.5 Application-Specific AI Chip Market: Overall Company Footprint Analysis
 - 3.5.1 Application-Specific AI Chip Market: Region Footprint
 - 3.5.2 Application-Specific AI Chip Market: Company Product Type Footprint
 - 3.5.3 Application-Specific AI Chip Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

- 4.1 Global Application-Specific AI Chip Market Size by Region
 - 4.1.1 Global Application-Specific AI Chip Sales Quantity by Region (2021-2032)
 - 4.1.2 Global Application-Specific AI Chip Consumption Value by Region (2021-2032)
 - 4.1.3 Global Application-Specific AI Chip Average Price by Region (2021-2032)
- 4.2 North America Application-Specific AI Chip Consumption Value (2021-2032)
- 4.3 Europe Application-Specific AI Chip Consumption Value (2021-2032)
- 4.4 Asia-Pacific Application-Specific AI Chip Consumption Value (2021-2032)
- 4.5 South America Application-Specific AI Chip Consumption Value (2021-2032)
- 4.6 Middle East & Africa Application-Specific AI Chip Consumption Value (2021-2032)

5 MARKET SEGMENT BY STRUTRUE

- 5.1 Global Application-Specific AI Chip Sales Quantity by Strutrue (2021-2032)
- 5.2 Global Application-Specific AI Chip Consumption Value by Strutrue (2021-2032)

5.3 Global Application-Specific AI Chip Average Price by Struttrue (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Application-Specific AI Chip Sales Quantity by Application (2021-2032)

6.2 Global Application-Specific AI Chip Consumption Value by Application (2021-2032)

6.3 Global Application-Specific AI Chip Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Application-Specific AI Chip Sales Quantity by Struttrue (2021-2032)

7.2 North America Application-Specific AI Chip Sales Quantity by Application (2021-2032)

7.3 North America Application-Specific AI Chip Market Size by Country

7.3.1 North America Application-Specific AI Chip Sales Quantity by Country (2021-2032)

7.3.2 North America Application-Specific AI Chip Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Application-Specific AI Chip Sales Quantity by Struttrue (2021-2032)

8.2 Europe Application-Specific AI Chip Sales Quantity by Application (2021-2032)

8.3 Europe Application-Specific AI Chip Market Size by Country

8.3.1 Europe Application-Specific AI Chip Sales Quantity by Country (2021-2032)

8.3.2 Europe Application-Specific AI Chip Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Application-Specific AI Chip Sales Quantity by Struttrue (2021-2032)

9.2 Asia-Pacific Application-Specific AI Chip Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific Application-Specific AI Chip Market Size by Region

9.3.1 Asia-Pacific Application-Specific AI Chip Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Application-Specific AI Chip Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Application-Specific AI Chip Sales Quantity by Strutrue (2021-2032)

10.2 South America Application-Specific AI Chip Sales Quantity by Application (2021-2032)

10.3 South America Application-Specific AI Chip Market Size by Country

10.3.1 South America Application-Specific AI Chip Sales Quantity by Country (2021-2032)

10.3.2 South America Application-Specific AI Chip Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Application-Specific AI Chip Sales Quantity by Strutrue (2021-2032)

11.2 Middle East & Africa Application-Specific AI Chip Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa Application-Specific AI Chip Market Size by Country

11.3.1 Middle East & Africa Application-Specific AI Chip Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa Application-Specific AI Chip Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

- 12.1 Application-Specific AI Chip Market Drivers
- 12.2 Application-Specific AI Chip Market Restraints
- 12.3 Application-Specific AI Chip Trends Analysis
- 12.4 Porters Five Forces Analysis
 - 12.4.1 Threat of New Entrants
 - 12.4.2 Bargaining Power of Suppliers
 - 12.4.3 Bargaining Power of Buyers
 - 12.4.4 Threat of Substitutes
 - 12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

- 13.1 Raw Material of Application-Specific AI Chip and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of Application-Specific AI Chip
- 13.3 Application-Specific AI Chip Production Process
- 13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

- 14.1 Sales Channel
 - 14.1.1 Direct to End-User
 - 14.1.2 Distributors
- 14.2 Application-Specific AI Chip Typical Distributors
- 14.3 Application-Specific AI Chip Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global CO2 Recovery System Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global CO2 Recovery System Consumption Value by Form Factor, (USD Million), 2021 & 2025 & 2032

Table 3. Global CO2 Recovery System Consumption Value by Inlet CO2 Concentration, (USD Million), 2021 & 2025 & 2032

Table 4. Global CO2 Recovery System Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. Asco Carbon Dioxide Basic Information, Manufacturing Base and Competitors

Table 6. Asco Carbon Dioxide Major Business

Table 7. Asco Carbon Dioxide CO2 Recovery System Product and Services

Table 8. Asco Carbon Dioxide CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. Asco Carbon Dioxide Recent Developments/Updates

Table 10. Mitsubishi Heavy Industries Basic Information, Manufacturing Base and Competitors

Table 11. Mitsubishi Heavy Industries Major Business

Table 12. Mitsubishi Heavy Industries CO2 Recovery System Product and Services

Table 13. Mitsubishi Heavy Industries CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. Mitsubishi Heavy Industries Recent Developments/Updates

Table 15. Bright Biomethane Basic Information, Manufacturing Base and Competitors

Table 16. Bright Biomethane Major Business

Table 17. Bright Biomethane CO2 Recovery System Product and Services

Table 18. Bright Biomethane CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. Bright Biomethane Recent Developments/Updates

Table 20. GEA Basic Information, Manufacturing Base and Competitors

Table 21. GEA Major Business

Table 22. GEA CO2 Recovery System Product and Services

Table 23. GEA CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. GEA Recent Developments/Updates

Table 25. Linde Engineering Basic Information, Manufacturing Base and Competitors

Table 26. Linde Engineering Major Business

Table 27. Linde Engineering CO2 Recovery System Product and Services

Table 28. Linde Engineering CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. Linde Engineering Recent Developments/Updates

Table 30. Sumitomo Seika Basic Information, Manufacturing Base and Competitors

Table 31. Sumitomo Seika Major Business

Table 32. Sumitomo Seika CO2 Recovery System Product and Services

Table 33. Sumitomo Seika CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Sumitomo Seika Recent Developments/Updates

Table 35. Shell Cansolv Basic Information, Manufacturing Base and Competitors

Table 36. Shell Cansolv Major Business

Table 37. Shell Cansolv CO2 Recovery System Product and Services

Table 38. Shell Cansolv CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. Shell Cansolv Recent Developments/Updates

Table 40. Cold Jet Basic Information, Manufacturing Base and Competitors

Table 41. Cold Jet Major Business

Table 42. Cold Jet CO2 Recovery System Product and Services

Table 43. Cold Jet CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Cold Jet Recent Developments/Updates

Table 45. Kinder Morgan Basic Information, Manufacturing Base and Competitors

Table 46. Kinder Morgan Major Business

Table 47. Kinder Morgan CO2 Recovery System Product and Services

Table 48. Kinder Morgan CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. Kinder Morgan Recent Developments/Updates

Table 50. Fluor Corporation Basic Information, Manufacturing Base and Competitors

Table 51. Fluor Corporation Major Business

Table 52. Fluor Corporation CO2 Recovery System Product and Services

Table 53. Fluor Corporation CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share

(2021-2026)

Table 54. Fluor Corporation Recent Developments/Updates

Table 55. Gulf Cryo Basic Information, Manufacturing Base and Competitors

Table 56. Gulf Cryo Major Business

Table 57. Gulf Cryo CO2 Recovery System Product and Services

Table 58. Gulf Cryo CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 59. Gulf Cryo Recent Developments/Updates

Table 60. Super Cryogenic Systems Basic Information, Manufacturing Base and Competitors

Table 61. Super Cryogenic Systems Major Business

Table 62. Super Cryogenic Systems CO2 Recovery System Product and Services

Table 63. Super Cryogenic Systems CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 64. Super Cryogenic Systems Recent Developments/Updates

Table 65. Pentair Haffmans Basic Information, Manufacturing Base and Competitors

Table 66. Pentair Haffmans Major Business

Table 67. Pentair Haffmans CO2 Recovery System Product and Services

Table 68. Pentair Haffmans CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 69. Pentair Haffmans Recent Developments/Updates

Table 70. Chart Industries Basic Information, Manufacturing Base and Competitors

Table 71. Chart Industries Major Business

Table 72. Chart Industries CO2 Recovery System Product and Services

Table 73. Chart Industries CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 74. Chart Industries Recent Developments/Updates

Table 75. Air Water Basic Information, Manufacturing Base and Competitors

Table 76. Air Water Major Business

Table 77. Air Water CO2 Recovery System Product and Services

Table 78. Air Water CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Air Water Recent Developments/Updates

Table 80. Taiyo Nippon Sanso Basic Information, Manufacturing Base and Competitors

Table 81. Taiyo Nippon Sanso Major Business

Table 82. Taiyo Nippon Sanso CO2 Recovery System Product and Services

Table 83. Taiyo Nippon Sanso CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Taiyo Nippon Sanso Recent Developments/Updates

Table 85. JFE Engineering Basic Information, Manufacturing Base and Competitors

Table 86. JFE Engineering Major Business

Table 87. JFE Engineering CO2 Recovery System Product and Services

Table 88. JFE Engineering CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 89. JFE Engineering Recent Developments/Updates

Table 90. Mitsubishi Kakoki Basic Information, Manufacturing Base and Competitors

Table 91. Mitsubishi Kakoki Major Business

Table 92. Mitsubishi Kakoki CO2 Recovery System Product and Services

Table 93. Mitsubishi Kakoki CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 94. Mitsubishi Kakoki Recent Developments/Updates

Table 95. JCCL Basic Information, Manufacturing Base and Competitors

Table 96. JCCL Major Business

Table 97. JCCL CO2 Recovery System Product and Services

Table 98. JCCL CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 99. JCCL Recent Developments/Updates

Table 100. Kawasaki Heavy Industries Basic Information, Manufacturing Base and Competitors

Table 101. Kawasaki Heavy Industries Major Business

Table 102. Kawasaki Heavy Industries CO2 Recovery System Product and Services

Table 103. Kawasaki Heavy Industries CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Kawasaki Heavy Industries Recent Developments/Updates

Table 105. PRODEVAL Basic Information, Manufacturing Base and Competitors

Table 106. PRODEVAL Major Business

Table 107. PRODEVAL CO2 Recovery System Product and Services

Table 108. PRODEVAL CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. PRODEVAL Recent Developments/Updates

Table 110. Steinecker Basic Information, Manufacturing Base and Competitors

Table 111. Steinecker Major Business

Table 112. Steinecker CO2 Recovery System Product and Services

Table 113. Steinecker CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. Steinecker Recent Developments/Updates

Table 115. Mellcon Engineers Pvt. Basic Information, Manufacturing Base and Competitors

Table 116. Mellcon Engineers Pvt. Major Business

Table 117. Mellcon Engineers Pvt. CO2 Recovery System Product and Services

Table 118. Mellcon Engineers Pvt. CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 119. Mellcon Engineers Pvt. Recent Developments/Updates

Table 120. Ashirwad Carbonics (India) Pvt Ltd. Basic Information, Manufacturing Base and Competitors

Table 121. Ashirwad Carbonics (India) Pvt Ltd. Major Business

Table 122. Ashirwad Carbonics (India) Pvt Ltd. CO2 Recovery System Product and Services

Table 123. Ashirwad Carbonics (India) Pvt Ltd. CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 124. Ashirwad Carbonics (India) Pvt Ltd. Recent Developments/Updates

Table 125. COMTECSWISS AG Basic Information, Manufacturing Base and Competitors

Table 126. COMTECSWISS AG Major Business

Table 127. COMTECSWISS AG CO2 Recovery System Product and Services

Table 128. COMTECSWISS AG CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 129. COMTECSWISS AG Recent Developments/Updates

Table 130. Separeco Basic Information, Manufacturing Base and Competitors

Table 131. Separeco Major Business

Table 132. Separeco CO2 Recovery System Product and Services

Table 133. Separeco CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. Separeco Recent Developments/Updates

Table 135. Supercryo Basic Information, Manufacturing Base and Competitors

Table 136. Supercryo Major Business

Table 137. Supercryo CO2 Recovery System Product and Services

Table 138. Supercryo CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Supercryo Recent Developments/Updates

Table 140. Solveno Technologies Basic Information, Manufacturing Base and Competitors

Table 141. Solveno Technologies Major Business

Table 142. Solveno Technologies CO2 Recovery System Product and Services

Table 143. Solveno Technologies CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 144. Solveno Technologies Recent Developments/Updates

Table 145. Steinecker GmbH Basic Information, Manufacturing Base and Competitors

Table 146. Steinecker GmbH Major Business

Table 147. Steinecker GmbH CO2 Recovery System Product and Services

Table 148. Steinecker GmbH CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 149. Steinecker GmbH Recent Developments/Updates

Table 150. Tecno Project Industriale Basic Information, Manufacturing Base and Competitors

Table 151. Tecno Project Industriale Major Business

Table 152. Tecno Project Industriale CO2 Recovery System Product and Services

Table 153. Tecno Project Industriale CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 154. Tecno Project Industriale Recent Developments/Updates

Table 155. Corosys Basic Information, Manufacturing Base and Competitors

Table 156. Corosys Major Business

Table 157. Corosys CO2 Recovery System Product and Services

Table 158. Corosys CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 159. Corosys Recent Developments/Updates

Table 160. Hypro Basic Information, Manufacturing Base and Competitors

Table 161. Hypro Major Business

Table 162. Hypro CO2 Recovery System Product and Services

Table 163. Hypro CO2 Recovery System Sales Quantity (K Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. Hypro Recent Developments/Updates

Table 165. Global CO2 Recovery System Sales Quantity by Manufacturer (2021-2026)

& (K Units)

Table 166. Global CO2 Recovery System Revenue by Manufacturer (2021-2026) & (USD Million)

Table 167. Global CO2 Recovery System Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 168. Market Position of Manufacturers in CO2 Recovery System, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 169. Head Office and CO2 Recovery System Production Site of Key Manufacturer

Table 170. CO2 Recovery System Market: Company Product Type Footprint

Table 171. CO2 Recovery System Market: Company Product Application Footprint

Table 172. CO2 Recovery System New Market Entrants and Barriers to Market Entry

Table 173. CO2 Recovery System Mergers, Acquisition, Agreements, and Collaborations

Table 174. Global CO2 Recovery System Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 175. Global CO2 Recovery System Sales Quantity by Region (2021-2026) & (K Units)

Table 176. Global CO2 Recovery System Sales Quantity by Region (2027-2032) & (K Units)

Table 177. Global CO2 Recovery System Consumption Value by Region (2021-2026) & (USD Million)

Table 178. Global CO2 Recovery System Consumption Value by Region (2027-2032) & (USD Million)

Table 179. Global CO2 Recovery System Average Price by Region (2021-2026) & (K US\$/Unit)

Table 180. Global CO2 Recovery System Average Price by Region (2027-2032) & (K US\$/Unit)

Table 181. Global CO2 Recovery System Sales Quantity by Type (2021-2026) & (K Units)

Table 182. Global CO2 Recovery System Sales Quantity by Type (2027-2032) & (K Units)

Table 183. Global CO2 Recovery System Consumption Value by Type (2021-2026) & (USD Million)

Table 184. Global CO2 Recovery System Consumption Value by Type (2027-2032) & (USD Million)

Table 185. Global CO2 Recovery System Average Price by Type (2021-2026) & (K US\$/Unit)

Table 186. Global CO2 Recovery System Average Price by Type (2027-2032) & (K

US\$/Unit)

Table 187. Global CO2 Recovery System Sales Quantity by Application (2021-2026) & (K Units)

Table 188. Global CO2 Recovery System Sales Quantity by Application (2027-2032) & (K Units)

Table 189. Global CO2 Recovery System Consumption Value by Application (2021-2026) & (USD Million)

Table 190. Global CO2 Recovery System Consumption Value by Application (2027-2032) & (USD Million)

Table 191. Global CO2 Recovery System Average Price by Application (2021-2026) & (K US\$/Unit)

Table 192. Global CO2 Recovery System Average Price by Application (2027-2032) & (K US\$/Unit)

Table 193. North America CO2 Recovery System Sales Quantity by Type (2021-2026) & (K Units)

Table 194. North America CO2 Recovery System Sales Quantity by Type (2027-2032) & (K Units)

Table 195. North America CO2 Recovery System Sales Quantity by Application (2021-2026) & (K Units)

Table 196. North America CO2 Recovery System Sales Quantity by Application (2027-2032) & (K Units)

Table 197. North America CO2 Recovery System Sales Quantity by Country (2021-2026) & (K Units)

Table 198. North America CO2 Recovery System Sales Quantity by Country (2027-2032) & (K Units)

Table 199. North America CO2 Recovery System Consumption Value by Country (2021-2026) & (USD Million)

Table 200. North America CO2 Recovery System Consumption Value by Country (2027-2032) & (USD Million)

Table 201. Europe CO2 Recovery System Sales Quantity by Type (2021-2026) & (K Units)

Table 202. Europe CO2 Recovery System Sales Quantity by Type (2027-2032) & (K Units)

Table 203. Europe CO2 Recovery System Sales Quantity by Application (2021-2026) & (K Units)

Table 204. Europe CO2 Recovery System Sales Quantity by Application (2027-2032) & (K Units)

Table 205. Europe CO2 Recovery System Sales Quantity by Country (2021-2026) & (K Units)

Table 206. Europe CO2 Recovery System Sales Quantity by Country (2027-2032) & (K Units)

Table 207. Europe CO2 Recovery System Consumption Value by Country (2021-2026) & (USD Million)

Table 208. Europe CO2 Recovery System Consumption Value by Country (2027-2032) & (USD Million)

Table 209. Asia-Pacific CO2 Recovery System Sales Quantity by Type (2021-2026) & (K Units)

Table 210. Asia-Pacific CO2 Recovery System Sales Quantity by Type (2027-2032) & (K Units)

Table 211. Asia-Pacific CO2 Recovery System Sales Quantity by Application (2021-2026) & (K Units)

Table 212. Asia-Pacific CO2 Recovery System Sales Quantity by Application (2027-2032) & (K Units)

Table 213. Asia-Pacific CO2 Recovery System Sales Quantity by Region (2021-2026) & (K Units)

Table 214. Asia-Pacific CO2 Recovery System Sales Quantity by Region (2027-2032) & (K Units)

Table 215. Asia-Pacific CO2 Recovery System Consumption Value by Region (2021-2026) & (USD Million)

Table 216. Asia-Pacific CO2 Recovery System Consumption Value by Region (2027-2032) & (USD Million)

Table 217. South America CO2 Recovery System Sales Quantity by Type (2021-2026) & (K Units)

Table 218. South America CO2 Recovery System Sales Quantity by Type (2027-2032) & (K Units)

Table 219. South America CO2 Recovery System Sales Quantity by Application (2021-2026) & (K Units)

Table 220. South America CO2 Recovery System Sales Quantity by Application (2027-2032) & (K Units)

Table 221. South America CO2 Recovery System Sales Quantity by Country (2021-2026) & (K Units)

Table 222. South America CO2 Recovery System Sales Quantity by Country (2027-2032) & (K Units)

Table 223. South America CO2 Recovery System Consumption Value by Country (2021-2026) & (USD Million)

Table 224. South America CO2 Recovery System Consumption Value by Country (2027-2032) & (USD Million)

Table 225. Middle East & Africa CO2 Recovery System Sales Quantity by Type

(2021-2026) & (K Units)

Table 226. Middle East & Africa CO2 Recovery System Sales Quantity by Type

(2027-2032) & (K Units)

Table 227. Middle East & Africa CO2 Recovery System Sales Quantity by Application

(2021-2026) & (K Units)

Table 228. Middle East & Africa CO2 Recovery System Sales Quantity by Application

(2027-2032) & (K Units)

Table 229. Middle East & Africa CO2 Recovery System Sales Quantity by Country

(2021-2026) & (K Units)

Table 230. Middle East & Africa CO2 Recovery System Sales Quantity by Country

(2027-2032) & (K Units)

Table 231. Middle East & Africa CO2 Recovery System Consumption Value by Country

(2021-2026) & (USD Million)

Table 232. Middle East & Africa CO2 Recovery System Consumption Value by Country

(2027-2032) & (USD Million)

Table 233. CO2 Recovery System Raw Material

Table 234. Key Manufacturers of CO2 Recovery System Raw Materials

Table 235. CO2 Recovery System Typical Distributors

Table 236. CO2 Recovery System Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. CO2 Recovery System Picture
- Figure 2. Global CO2 Recovery System Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global CO2 Recovery System Revenue Market Share by Type in 2025
- Figure 4. Chemical Absorption Examples
- Figure 5. Physical Adsorption Examples
- Figure 6. Membrane Separation Examples
- Figure 7. Compression and Condensation Examples
- Figure 8. Others Examples
- Figure 9. Global CO2 Recovery System Revenue by Form Factor, (USD Million), 2021 & 2025 & 2032
- Figure 10. Global CO2 Recovery System Revenue Market Share by Form Factor in 2025
- Figure 11. Stationary Examples
- Figure 12. Mobile Examples
- Figure 13. Global CO2 Recovery System Revenue by Inlet CO2 Concentration, (USD Million), 2021 & 2025 & 2032
- Figure 14. Global CO2 Recovery System Revenue Market Share by Inlet CO2 Concentration in 2025
- Figure 15. High Concentration Examples
- Figure 16. Low Concentration Examples
- Figure 17. Global CO2 Recovery System Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 18. Global CO2 Recovery System Revenue Market Share by Application in 2025
- Figure 19. Flue Gas CO₂ Recovery (SGR) Examples
- Figure 20. Process/By-product Gas CO₂ Recovery (BPR) Examples
- Figure 21. Dry Ice Production and Related CO₂ Recovery Examples
- Figure 22. Fermentation and Food and Beverage CO₂ Recovery Examples
- Figure 23. Others Examples
- Figure 24. Global CO2 Recovery System Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 25. Global CO2 Recovery System Consumption Value and Forecast (2021-2032) & (USD Million)
- Figure 26. Global CO2 Recovery System Sales Quantity (2021-2032) & (K Units)
- Figure 27. Global CO2 Recovery System Price (2021-2032) & (K US\$/Unit)

Figure 28. Global CO2 Recovery System Sales Quantity Market Share by Manufacturer in 2025

Figure 29. Global CO2 Recovery System Revenue Market Share by Manufacturer in 2025

Figure 30. Producer Shipments of CO2 Recovery System by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 31. Top 3 CO2 Recovery System Manufacturer (Revenue) Market Share in 2025

Figure 32. Top 6 CO2 Recovery System Manufacturer (Revenue) Market Share in 2025

Figure 33. Global CO2 Recovery System Sales Quantity Market Share by Region (2021-2032)

Figure 34. Global CO2 Recovery System Consumption Value Market Share by Region (2021-2032)

Figure 35. North America CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 36. Europe CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 37. Asia-Pacific CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 38. South America CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 39. Middle East & Africa CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 40. Global CO2 Recovery System Sales Quantity Market Share by Type (2021-2032)

Figure 41. Global CO2 Recovery System Consumption Value Market Share by Type (2021-2032)

Figure 42. Global CO2 Recovery System Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 43. Global CO2 Recovery System Sales Quantity Market Share by Application (2021-2032)

Figure 44. Global CO2 Recovery System Revenue Market Share by Application (2021-2032)

Figure 45. Global CO2 Recovery System Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 46. North America CO2 Recovery System Sales Quantity Market Share by Type (2021-2032)

Figure 47. North America CO2 Recovery System Sales Quantity Market Share by Application (2021-2032)

Figure 48. North America CO2 Recovery System Sales Quantity Market Share by

Country (2021-2032)

Figure 49. North America CO2 Recovery System Consumption Value Market Share by Country (2021-2032)

Figure 50. United States CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 51. Canada CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 52. Mexico CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 53. Europe CO2 Recovery System Sales Quantity Market Share by Type (2021-2032)

Figure 54. Europe CO2 Recovery System Sales Quantity Market Share by Application (2021-2032)

Figure 55. Europe CO2 Recovery System Sales Quantity Market Share by Country (2021-2032)

Figure 56. Europe CO2 Recovery System Consumption Value Market Share by Country (2021-2032)

Figure 57. Germany CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 58. France CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 59. United Kingdom CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 60. Russia CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 61. Italy CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 62. Asia-Pacific CO2 Recovery System Sales Quantity Market Share by Type (2021-2032)

Figure 63. Asia-Pacific CO2 Recovery System Sales Quantity Market Share by Application (2021-2032)

Figure 64. Asia-Pacific CO2 Recovery System Sales Quantity Market Share by Region (2021-2032)

Figure 65. Asia-Pacific CO2 Recovery System Consumption Value Market Share by Region (2021-2032)

Figure 66. China CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 67. Japan CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 68. South Korea CO2 Recovery System Consumption Value (2021-2032) &

(USD Million)

Figure 69. India CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 70. Southeast Asia CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 71. Australia CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 72. South America CO2 Recovery System Sales Quantity Market Share by Type (2021-2032)

Figure 73. South America CO2 Recovery System Sales Quantity Market Share by Application (2021-2032)

Figure 74. South America CO2 Recovery System Sales Quantity Market Share by Country (2021-2032)

Figure 75. South America CO2 Recovery System Consumption Value Market Share by Country (2021-2032)

Figure 76. Brazil CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 77. Argentina CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 78. Middle East & Africa CO2 Recovery System Sales Quantity Market Share by Type (2021-2032)

Figure 79. Middle East & Africa CO2 Recovery System Sales Quantity Market Share by Application (2021-2032)

Figure 80. Middle East & Africa CO2 Recovery System Sales Quantity Market Share by Country (2021-2032)

Figure 81. Middle East & Africa CO2 Recovery System Consumption Value Market Share by Country (2021-2032)

Figure 82. Turkey CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 83. Egypt CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 84. Saudi Arabia CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 85. South Africa CO2 Recovery System Consumption Value (2021-2032) & (USD Million)

Figure 86. CO2 Recovery System Market Drivers

Figure 87. CO2 Recovery System Market Restraints

Figure 88. CO2 Recovery System Market Trends

Figure 89. Porters Five Forces Analysis

Figure 90. Manufacturing Cost Structure Analysis of CO2 Recovery System in 2025

Figure 91. Manufacturing Process Analysis of CO2 Recovery System

Figure 92. CO2 Recovery System Industrial Chain

Figure 93. Sales Channel: Direct to End-User vs Distributors

Figure 94. Direct Channel Pros & Cons

Figure 95. Indirect Channel Pros & Cons

Figure 96. Methodology

Figure 97. Research Process and Data Source

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