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Global Carbon Dioxide (CO?) Compression Equipment Market Growth 2026-2032

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Abstracts

The global Carbon Dioxide (CO?) Compression Equipment market size is predicted to grow from US$ 1696 million in 2025 to US$ 3350 million in 2032; it is expected to grow at a CAGR of 10.2% from 2026 to 2032.

Carbon Dioxide (CO?) Compression Equipment refers to specialized industrial compression equipment designed to increase the pressure of CO? or CO?-rich gas streams for transportation, storage, injection, recovery, utilization, or downstream process requirements. The market primarily covers centrifugal, reciprocating, diaphragm, screw, and other industrial CO? compressors, including standalone compressor units and packaged systems incorporating drivers, intercooling, separation, lubrication, sealing, instrumentation, and control equipment directly associated with compression. Key equipment parameters include flow capacity, suction and discharge pressure, compression ratio, gas composition, number of stages, power rating, and materials compatibility. Centrifugal compressors, particularly integrally geared and single-shaft configurations, are important in high-flow applications, while reciprocating and diaphragm compressors serve a broader range of high-pressure, medium- and low-flow duties. Major applications include carbon capture, utilization and storage, urea and fertilizer production, enhanced oil recovery, industrial CO? recovery, industrial gases, food and beverage processing, and supercritical CO?-related processes. The study focuses on industrial and process CO? compression equipment as the core research object.

Key FindingsThe gross margin of the global carbon dioxide compression equipment industry was approximately 25%–35% in 2025.Centrifugal compressors are the main product type.CCUS is the fastest-growing application.Europe is the leading production region for high-end equipment.Localization of large-scale CCUS compressors continues

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to advance in China.High-flow and high-pressure compressor units occupy the high-value segment.

Market Trends

The most important technology trend is the shift toward higher-flow, higher-pressure and more energy-efficient compression architectures for CCUS. Integrally geared compressors are becoming increasingly prominent because different impellers can operate at individually optimized speeds and multiple compression sections can be integrated within one casing. At the same time, conventional single-shaft centrifugal compressors remain important for high-pressure and high-pressure-ratio duties, while reciprocating compressors continue to serve applications requiring high discharge pressures and flexible operating envelopes. Siemens Energy currently offers reciprocating, single-shaft and integrally geared configurations specifically for CO? service, confirming that the market is evolving through multiple complementary technology routes rather than toward a single universal architecture.

Standardization and modularization are becoming more important as the project pipeline moves from individual demonstration facilities toward repeatable commercial deployment. Pre-engineered compression modules, skid-mounted auxiliary systems, electric drives, integrated intercooling and heat recovery can shorten project engineering cycles and reduce installation complexity. Equipment manufacturers are also improving corrosion-resistant materials, seals, rotor stability and performance prediction for dense-phase and high-pressure CO?, where rapid changes in gas properties impose stricter engineering requirements than conventional air compression.

Market Dynamics

The market is transitioning from a historically mature industrial compressor niche into a broader carbon-management equipment category. Traditional demand from fertilizer production, natural-gas processing, EOR, industrial gases and CO? recovery provides an installed base and proven operating experience, while new CCUS projects are increasing the importance of larger electrically driven compressor trains, pipeline-pressure compression and compression-to-storage solutions. Mitsubishi Heavy Industries has delivered more than 100 CO? compressors across fertilizer, gas-processing and CCUS-related applications, illustrating how mature process-compressor experience is being transferred into the emerging decarbonization market.

Demand timing nevertheless remains project-driven. Compression equipment

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procurement typically follows engineering definition, permitting, financing and final investment decisions, creating greater annual order volatility than in standardized industrial equipment markets. The growing number of projects reaching construction and operating phases improves medium-term visibility, but planned project capacity should not be translated directly into compressor revenue because schedules, project configurations and procurement boundaries differ materially.

Drivers

Expansion of CCS and CCUS infrastructure is the strongest incremental demand driver. The Global CCS Institute reported that operating projects increased to 77 in 2025 and a further 47 were under construction. The IEA also identified more than 30 final investment decisions over the preceding two years, with operational capture capacity expected to increase materially toward 2030 as projects currently under construction are completed. These developments create demand not only at capture plants but also at gathering hubs, pipeline systems, injection facilities and CO? transport infrastructure.

Industrial decarbonization is broadening the downstream customer base beyond traditional oil and gas and fertilizer users. Cement, chemicals, power generation, low-carbon ammonia, methanol and other hard-to-abate industrial sectors increasingly require compression between capture and transportation or storage. Large hub projects can also aggregate CO? from multiple emitters, supporting larger compressor capacities and creating opportunities for standardized high-flow compression platforms.

Restraints

High capital intensity and power consumption remain major constraints. Compressing CO? from relatively low capture pressures to pipeline, dense-phase or injection pressures requires multiple compression stages, intercooling and substantial drive power. Equipment efficiency therefore has a direct impact on total CCUS operating economics, while power availability and electrical infrastructure can become practical constraints for large projects.

Project development risk is another important limitation. Delays in permitting, storage-site development, pipelines, financing or carbon-policy implementation can postpone compressor procurement even after capture projects have been announced. Demand is therefore less dependent on announced project pipelines than on the number of projects progressing into construction, equipment contracting and final investment stages.

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Opportunities

The largest incremental opportunity lies in industrial-scale CCUS networks. Compression is required between captured CO? and most pipeline, shipping, utilization or geological-storage routes, giving compressor suppliers exposure across multiple parts of the carbon-management value chain. New projects increasingly require equipment capable of handling changing CO? compositions, high pressures and larger volumes while maintaining high availability.

Low-carbon ammonia, methanol and other carbon-utilization pathways provide an additional growth opportunity. Expansion of shared CO? infrastructure may also create demand for booster stations and intermediate compression in addition to compression at individual capture sites. Modularized compressor packages are particularly well positioned where multiple projects share similar pressure and capacity requirements.

Challenges

CO? is a demanding compression medium. Gas density and thermodynamic properties change significantly with pressure and temperature, particularly near critical and dense-phase conditions. Water and impurities can also create carbonic-acid corrosion and other material-related risks, requiring specialized metallurgy, coatings, seals, drainage systems and process controls. MHI has specifically developed corrosion-prevention and rotor-stability technologies for high-pressure CO? service, illustrating the engineering barriers involved.

Another challenge is the lack of a single standardized operating envelope. Capture technology, inlet pressure, CO? purity, destination pressure and transportation method differ by project, limiting full product standardization. Manufacturers must balance modularization with project-specific engineering, while long validation cycles and the importance of proven reference installations continue to create barriers for new entrants.

Industry Chain Analysis

The upstream industry includes specialty steel and alloy materials, castings and forgings, impellers, shafts, gears, bearings, dry-gas and mechanical seals, valves, motors, gearboxes, instrumentation, control systems, intercoolers and pressure vessels. Material selection becomes increasingly important as pressure rises and CO? streams contain water or other impurities.

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The midstream segment consists of compressor OEMs, package engineering, assembly, machining, rotor balancing, performance testing and system integration. Downstream customers include CCUS projects, oil and gas operators, fertilizer and chemical producers, industrial gas companies, power plants, cement and steel facilities, food and beverage processors, and emerging low-carbon fuel producers. Aftermarket maintenance, spare parts, monitoring and performance optimization constitute an important recurring service layer throughout the installed equipment life cycle.

Value Chain Analysis

Value creation is concentrated in compressor thermodynamic design, aerodynamic engineering, rotor dynamics, high-pressure casing design, materials and sealing technology, package integration and manufacturing quality. For large CCUS compressor trains, reference installations and the ability to guarantee efficiency, reliability and continuous operating performance are often more important than equipment purchase price alone.

The value chain is therefore differentiated by engineering capability rather than manufacturing scale alone. Large custom centrifugal packages typically carry substantial engineering content, while specialized reciprocating and diaphragm compressor manufacturers create value through high-pressure capability, gas purity, leakage control and flexible customization. Lifecycle service becomes progressively more important as the installed base expands.

Segment Insights

By Compressor Type, centrifugal compressors account for the largest revenue contribution because of their use in large-flow CCUS, pipeline, fertilizer and process applications. Integrally geared and single-shaft designs form the principal centrifugal configurations. Reciprocating compressors maintain broad adoption where higher compression ratios, flexible flow conditions or high discharge pressures are required. Diaphragm compressors are concentrated in high-purity and low-flow high-pressure applications, while screw compressors occupy selected industrial process niches. The product classification remains Centrifugal Compressors, Reciprocating Compressors, Diaphragm Compressors, Screw Compressors and Others.

By Application, Carbon Capture, Utilization and Storage is the strongest incremental growth area. Urea and Fertilizer Production remains an important established

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application, while Enhanced Oil Recovery, CO? Recovery and Industrial Gas Processing, Food and Beverage Processing, and Supercritical CO? and Power Applications provide diversified demand. By discharge pressure and rated flow, high-flow equipment is increasingly associated with major CCUS and pipeline projects, while smaller-flow equipment remains fragmented across industrial gases, recovery, food processing and specialized high-pressure applications.

Downstream Market Opportunities

Cement and steel are becoming strategically important downstream opportunities because they combine large point-source emissions with relatively limited alternatives for deep process decarbonization. Power generation and chemical facilities can provide larger individual capture volumes, while industrial gas and food and beverage markets offer smaller but more repeatable compressor demand.

Low-carbon ammonia and methanol projects create another attractive intersection between conventional process compression and CCUS. The development of shared transport and storage networks can further reduce the need for each emitter to establish a standalone carbon-storage chain, potentially accelerating adoption among medium-sized industrial facilities and increasing demand for standardized compression packages.

Regional Insights

Europe is an important high-value production and demand region, with a dense compressor-engineering base and expanding cross-border CO? transport and storage infrastructure. Its market is increasingly oriented toward electrically driven, high-efficiency and modular CCUS compression systems. The region's cluster-based approach is creating demand across capture sites, centralized transport networks and offshore storage.

North America combines long-standing CO? compression experience in EOR, fertilizer and gas processing with a growing portfolio of carbon-management projects. Japan has strong engineering capabilities in large industrial and high-pressure compressors. China is expanding domestic capability in large centrifugal and integrally geared CO? compression and is progressively moving from conventional chemical-industry applications into larger CCUS demonstration and commercial projects. Other Asian markets currently have a comparatively smaller base of dedicated local CO? compressor OEMs and rely more heavily on international technology and regional

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project integration.

Competitive Landscape Analysis

The supply structure is relatively concentrated at the high-flow, high-pressure end and more fragmented in medium- and small-capacity equipment. Europe has the deepest concentration of specialized high-end compressor technology providers, particularly in centrifugal, integrally geared and high-pressure reciprocating equipment. North America has strong installed references in oil and gas, EOR and emerging CCS infrastructure, while Japan maintains competitive strengths in large process compressors and long-duration industrial operating experience.

China is becoming increasingly important in domestic large-scale CCUS compressor supply, increasing regional competition and reducing dependence on imported equipment in selected projects. Entry barriers remain high in critical applications because customers place substantial weight on proven references, API-compliant engineering, pressure and performance guarantees, manufacturing and test capability, rotor and seal technology, and long-term service support. Competition is therefore shifting from simple compressor supply toward lifecycle efficiency, modular engineering, system integration and project execution capability.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Carbon Dioxide (CO?) Compression Equipment Industry Forecast” looks at past sales and reviews total world Carbon Dioxide (CO?) Compression Equipment sales in 2025, providing a comprehensive analysis by region and market sector of projected Carbon Dioxide (CO?) Compression Equipment sales for 2026 through 2032. With Carbon Dioxide (CO?) Compression Equipment sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Carbon Dioxide (CO?) Compression Equipment industry.

This Insight Report provides a comprehensive analysis of the global Carbon Dioxide (CO?) Compression Equipment landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Carbon Dioxide (CO?) Compression Equipment portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Carbon Dioxide (CO?)

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Compression Equipment market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Carbon Dioxide (CO?) Compression Equipment and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Carbon Dioxide (CO?) Compression Equipment.

This report presents a comprehensive overview, market shares, and growth opportunities of Carbon Dioxide (CO?) Compression Equipment market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Centrifugal Compressors

Reciprocating Compressors

Diaphragm Compressors

Screw Compressors

Others

Segmentation by Discharge Pressure:

Below 50 bar

50–150 bar

150–250 bar

Above 250 bar

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Segmentation by Rated Flow Capacity:

Below 1,000 Nm?/h

1,000–10,000 Nm?/h

10,000–100,000 Nm?/h

Above 100,000 Nm?/h

Segmentation by Application:

Oil and Gas

Chemicals and Fertilizers

Power Generation

Industrial Gas

Food and Beverage

Cement, Steel and Other Heavy Industries

Others

This report also splits the market by region:

Americas

United States

Canada

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- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey

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GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Siemens Energy AG

Mitsubishi Heavy Industries, Ltd.

Baker Hughes Company

Everllence SE

Atlas Copco AB

Burckhardt Compression Holding AG

Shenyang Blower Works Group Corporation

NEUMAN & ESSER GROUP

Kobe Steel, Ltd.

Sundyne, LLC

SIAD Macchine Impianti S.p.A.

Mehrer Compression GmbH

PDC Machines, LLC

Shaanxi Blower (Group) Co., Ltd.

AST Power Technology (Jiangsu) Co., Ltd.

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Key Questions Addressed in this Report

What is the 10-year outlook for the global Carbon Dioxide (CO?) Compression Equipment market?

What factors are driving Carbon Dioxide (CO?) Compression Equipment market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Carbon Dioxide (CO?) Compression Equipment market opportunities vary by end market size?

How does Carbon Dioxide (CO?) Compression Equipment break out by Type, by Application?

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