

# **Carbon Capture Materials Market Forecasts to 2032 – Global Analysis By Material (Liquid Solvents, Solid Sorbents, Membranes, and Emerging Materials), Process (Absorption, Adsorption, Membrane Separation, Cryogenic Distillation, and Direct Air Capture [DAC]), Technology, End User, and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Carbon Capture Materials Market is accounted for \$67.2 billion in 2025 and is expected to reach \$121.4 billion by 2032 growing at a CAGR of 8.8% during the forecast period. Carbon capture materials include liquid solvents, solid sorbents, membranes, and advanced adsorbents used across post-combustion, pre-combustion, and direct-air capture processes to separate and concentrate CO<sub>2</sub> for storage or utilization. Growth is driven by tightening emissions targets, corporate net-zero commitments, and scaling of industrial capture projects in power, cement, steel, and chemicals.

According to the International Energy Agency (IEA), new carbon capture materials are enabling capture of over 40 million tonnes of CO<sub>2</sub> annually, with ongoing large-scale projects worldwide.

### **Market Dynamics:**

Driver:

Growing global focus on climate change mitigation

Growing global focus on climate change mitigation has rapidly and sustainably increased demand for carbon capture materials and technologies. Governments, corporations, and international bodies are committing to net zero targets and stricter emissions policies, prompting investment in solvents, sorbents, membranes, and direct air capture research. This policy and market push channels funding toward scale up, pilot projects, and industrial demonstrations while encouraging private partnerships and collaboration. Furthermore, predictable regulatory frameworks and carbon pricing mechanisms create business cases for deployment, motivating manufacturers to improve capture efficiency, reduce costs, and expand supply chains to meet anticipated industrial requirements.

#### Restraint:

##### Energy-intensive processes reducing overall efficiency

Energy intensive processes reduce overall efficiency across many carbon capture technologies. Solvent regeneration, high temperature sorbent cycles and some membrane systems demand substantial heat and electricity, which lowers net CO<sub>2</sub> removal and raises operational costs. High parasitic loads complicate integration with power plants and can offset captured emissions where low carbon energy is scarce. These energy burdens increase life cycle emissions and capital expenditure for auxiliary equipment.

#### Opportunity:

##### Increasing government incentives and funding for projects

Government incentives and project funding are accelerating commercialization of carbon capture materials and demonstrations. Subsidies, tax credits, and concessional financing lower capital barriers for pilot plants, encouraging private investment and enabling technology validation at scale. Additionally public procurement and mandated emissions reductions create demand for capture solutions across power generation, cement, steel, and chemical industries. International climate funds and public private partnerships de risk investment and help firms scale manufacturing and supply chains. Moreover targeted R&D grants improve material performance and reduce levelized costs strengthening commercial viability and investor confidence and private equity interest.

#### Threat:

## Regulatory uncertainties and policy inconsistencies

Regulatory uncertainties and policy inconsistencies create significant risk for carbon capture materials markets. Varying national approaches to carbon pricing differing eligibility rules for credits and shifting subsidy frameworks create investment ambiguity and complicate long term planning. Developers face unclear pathways to monetize captured CO<sub>2</sub> while changes in permitting storage liability and accounting standards can alter project economics. Such instability deters capital delays project timelines and raises sovereign risk for international investors. Moreover inconsistent standards impede harmonization of supply chains and technology validation making it harder for manufacturers to design universally compliant systems to scale globally.

### **Covid-19 Impact:**

Covid19 had a mixed impact on the carbon capture materials market. Early supply chain disruptions and diverted public spending delayed projects while reduced industrial activity temporarily lowered demand at point sources. Recovery packages and green stimulus later revived funding for pilot plants and R&D. The crisis sharpened political focus on resilient decarbonization pathways and reinforced long term support for capture materials even as near term schedules shifted by supply and financing constraints across markets.

The liquid solvents segment is expected to be the largest during the forecast period

The liquid solvents segment is expected to account for the largest market share during the forecast period because they are technically mature and already deployed at industrial scale for post combustion capture. Amines and newer blended solvents provide high CO<sub>2</sub> selectivity and established regeneration cycles enabling retrofit solutions for power plants and industrial boilers with manageable modifications. Established supply chains operational know how and regulatory familiarity reduce project risk and ease financing. Continual solvent chemistry improvements target lower energy consumption and corrosion enhancing economics and operational life which sustains broad adoption and cements their market leadership in installed capacity.

The direct air capture (DAC) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the direct air capture (DAC) segment is predicted to witness

the highest growth rate because it addresses corporate net zero commitments and markets that demand durable sequestration. Advances in low energy sorbents modular plant design and waste heat utilization are lowering capital and operating expenses per tonne of CO<sub>2</sub> removed. Policy tools such as removal credits procurement guarantees and blended financing further de risk scale ups. As governments and commercial offtakers contract for removal capacity investment increases accelerating deployment and reinforcing DAC s growth advantage over mature point source capture technologies in diverse regions.

### **Region with largest share:**

During the forecast period, the North America region is expected to hold the largest market share driven by a combination of advanced industrial infrastructure emissions reduction commitments and deep capital markets. The region hosts mature power cement and chemical sectors where capture retrofits are technically feasible and economically supported by tax incentives and carbon policy mechanisms. Well established research institutions experienced EPCs and established CO<sub>2</sub> storage and transport projects reduce deployment barriers. Additionally active private investment and public funding for large scale demonstrations accelerate commercialization ensuring North America retains market leadership.

### **Region with highest CAGR:**

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR as rapid industrialisation rising energy demand and stringent air quality goals drive adoption of capture technologies. Large emerging economies are investing in pilot projects local manufacturing and skilled workforces while international vendors enter through partnerships and licensing. Expanding availability of financing increasing corporate sustainability commitments and government policies supporting low carbon technologies further accelerate uptake. Moreover growing demand from heavy industries and power generation combined with falling equipment costs positions Asia Pacific for the fastest growth.

### **Key players in the market**

Some of the key players in Carbon Capture Materials Market include Ecolab Inc., BASF SE, Dow Inc., Mitsubishi Heavy Industries, Ltd., Solvay S.A., Air Products and Chemicals, Inc., Tosoh Corporation, Honeywell International Inc., Zeochem AG, Climeworks AG, Global Thermostat, CO<sub>2</sub> Solutions by Saipem, Carbon Clean

Solutions, Carbon Engineering Ltd., Aker Carbon Capture ASA, CarbonFree, Carbfix, ExxonMobil Low Carbon Solutions, Air Liquide, and Shell plc.

### **Key Developments:**

In May 2025, BASF became the first company to produce metal-organic frameworks (MOFs) on a multi-ton production scale for carbon capture. These MOFs, highly crystalline structures with nanometer-sized pores and large surface area, will be used as solid sorbents for carbon capture projects in various industrial sectors including hydrogen, pulp and paper, cement, steel, aluminum, and chemicals.

In May 2024, Climeworks announced the launch of its next-generation Direct Air Capture (DAC) technology, Generation 3, which features a new structured adsorbent material designed to cut energy requirements in half and double the lifetime compared to previous generations, aiming to drive down the cost of carbon removal.

In March 2024, Shell made a final investment decision for the Polaris project at its Scotford refinery, a carbon capture project using Shell's own amine-based solvent technology to capture approximately 650,000 tonnes of CO<sub>2</sub> annually from the refinery.

In February 2024, Carbfix and its partner SLB announced the launch of the Carbfix2 project at Hellisheiði Power Station, which will integrate an advanced amine-based capture system with Carbfix's underground mineralization technology, creating an integrated chain for capturing and permanently storing CO<sub>2</sub> as rock.

### **Materials Covered:**

Liquid Solvents

Solid Sorbents

Membranes

Emerging Materials

### **Process Covered:**

Absorption

Adsorption

Membrane Separation

Cryogenic Distillation

Direct Air Capture (DAC)

#### Technologies Covered:

Pre-Combustion Capture

Post-Combustion Capture

Oxyfuel Combustion

Direct Air Capture (DAC)

#### End Users Covered:

Power Generation

Oil & Gas

Chemical & Petrochemical

Cement & Steel Manufacturing

Metal & Mining

Industrial Processes

Other End Users

#### Regions Covered:

## North America

US

Canada

Mexico

## Europe

Germany

UK

Italy

France

Spain

Rest of Europe

## Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

## South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

**Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Technology Analysis
- 3.7 End User Analysis
- 3.8 Emerging Markets
- 3.9 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

## **5 GLOBAL CARBON CAPTURE MATERIALS MARKET, BY MATERIAL**

- 5.1 Introduction
- 5.2 Liquid Solvents
  - 5.2.1 Amines
  - 5.2.2 Alkanolamines
- 5.3 Solid Sorbents
  - 5.3.1 Metal-Organic Frameworks (MOFs)
  - 5.3.2 Zeolites
  - 5.3.3 Activated Carbon
- 5.4 Membranes
  - 5.4.1 Polymeric Membranes
  - 5.4.2 Inorganic Membranes
- 5.5 Emerging Materials
  - 5.5.1 Ionic Liquids
  - 5.5.2 Hybrid Materials

## **6 GLOBAL CARBON CAPTURE MATERIALS MARKET, BY PROCESS**

- 6.1 Introduction
- 6.2 Absorption
  - 6.2.1 Chemical Absorption
  - 6.2.2 Physical Absorption
- 6.3 Adsorption
  - 6.3.1 Physisorption
  - 6.3.2 Chemisorption
- 6.4 Membrane Separation
- 6.5 Cryogenic Distillation
- 6.6 Direct Air Capture (DAC)

## **7 GLOBAL CARBON CAPTURE MATERIALS MARKET, BY TECHNOLOGY**

- 7.1 Introduction
- 7.2 Pre-Combustion Capture
- 7.3 Post-Combustion Capture
- 7.4 Oxyfuel Combustion
- 7.5 Direct Air Capture (DAC)

## **8 GLOBAL CARBON CAPTURE MATERIALS MARKET, BY END USER**

- 8.1 Introduction
- 8.2 Power Generation
- 8.3 Oil & Gas
- 8.4 Chemical & Petrochemical
- 8.5 Cement & Steel Manufacturing
- 8.6 Metal & Mining
- 8.7 Industrial Processes
- 8.8 Other End Users

## **9 GLOBAL CARBON CAPTURE MATERIALS MARKET, BY GEOGRAPHY**

- 9.1 Introduction
- 9.2 North America
  - 9.2.1 US
  - 9.2.2 Canada
  - 9.2.3 Mexico
- 9.3 Europe
  - 9.3.1 Germany
  - 9.3.2 UK
  - 9.3.3 Italy
  - 9.3.4 France
  - 9.3.5 Spain
  - 9.3.6 Rest of Europe
- 9.4 Asia Pacific
  - 9.4.1 Japan
  - 9.4.2 China
  - 9.4.3 India
  - 9.4.4 Australia
  - 9.4.5 New Zealand
  - 9.4.6 South Korea
  - 9.4.7 Rest of Asia Pacific
- 9.5 South America
  - 9.5.1 Argentina
  - 9.5.2 Brazil
  - 9.5.3 Chile
  - 9.5.4 Rest of South America
- 9.6 Middle East & Africa
  - 9.6.1 Saudi Arabia

- 9.6.2 UAE
- 9.6.3 Qatar
- 9.6.4 South Africa
- 9.6.5 Rest of Middle East & Africa

## **10 KEY DEVELOPMENTS**

- 10.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 10.2 Acquisitions & Mergers
- 10.3 New Product Launch
- 10.4 Expansions
- 10.5 Other Key Strategies

## **11 COMPANY PROFILING**

- 11.1 Ecolab Inc.
- 11.2 BASF SE
- 11.3 Dow Inc.
- 11.4 Mitsubishi Heavy Industries, Ltd.
- 11.5 Solvay S.A.
- 11.6 Air Products and Chemicals, Inc.
- 11.7 Tosoh Corporation
- 11.8 Honeywell International Inc.
- 11.9 Zeochem AG
- 11.10 Climeworks AG
- 11.11 Global Thermostat
- 11.12 CO2 Solutions by Saipem
- 11.13 Carbon Clean Solutions
- 11.14 Carbon Engineering Ltd.
- 11.15 Aker Carbon Capture ASA
- 11.16 CarbonFree
- 11.17 Carbfix
- 11.18 ExxonMobil Low Carbon Solutions
- 11.19 Air Liquide
- 11.20 Shell plc

## List Of Tables

### LIST OF TABLES

Table 1 Global Carbon Capture Materials Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Carbon Capture Materials Market Outlook, By Material (2024–2032) (\$MN)

Table 3 Global Carbon Capture Materials Market Outlook, By Liquid Solvents (2024–2032) (\$MN)

Table 4 Global Carbon Capture Materials Market Outlook, By Amines (2024–2032) (\$MN)

Table 5 Global Carbon Capture Materials Market Outlook, By Alkanolamines (2024–2032) (\$MN)

Table 6 Global Carbon Capture Materials Market Outlook, By Solid Sorbents (2024–2032) (\$MN)

Table 7 Global Carbon Capture Materials Market Outlook, By Metal-Organic Frameworks (MOFs) (2024–2032) (\$MN)

Table 8 Global Carbon Capture Materials Market Outlook, By Zeolites (2024–2032) (\$MN)

Table 9 Global Carbon Capture Materials Market Outlook, By Activated Carbon (2024–2032) (\$MN)

Table 10 Global Carbon Capture Materials Market Outlook, By Membranes (2024–2032) (\$MN)

Table 11 Global Carbon Capture Materials Market Outlook, By Polymeric Membranes (2024–2032) (\$MN)

Table 12 Global Carbon Capture Materials Market Outlook, By Inorganic Membranes (2024–2032) (\$MN)

Table 13 Global Carbon Capture Materials Market Outlook, By Emerging Materials (2024–2032) (\$MN)

Table 14 Global Carbon Capture Materials Market Outlook, By Ionic Liquids (2024–2032) (\$MN)

Table 15 Global Carbon Capture Materials Market Outlook, By Hybrid Materials (2024–2032) (\$MN)

Table 16 Global Carbon Capture Materials Market Outlook, By Process (2024–2032) (\$MN)

Table 17 Global Carbon Capture Materials Market Outlook, By Absorption (2024–2032) (\$MN)

Table 18 Global Carbon Capture Materials Market Outlook, By Chemical Absorption

(2024–2032) (\$MN)

Table 19 Global Carbon Capture Materials Market Outlook, By Physical Absorption

(2024–2032) (\$MN)

Table 20 Global Carbon Capture Materials Market Outlook, By Adsorption (2024–2032)

(\$MN)

Table 21 Global Carbon Capture Materials Market Outlook, By Physisorption

(2024–2032) (\$MN)

Table 22 Global Carbon Capture Materials Market Outlook, By Chemisorption

(2024–2032) (\$MN)

Table 23 Global Carbon Capture Materials Market Outlook, By Membrane Separation

(2024–2032) (\$MN)

Table 24 Global Carbon Capture Materials Market Outlook, By Cryogenic Distillation

(2024–2032) (\$MN)

Table 25 Global Carbon Capture Materials Market Outlook, By Direct Air Capture (DAC)

(2024–2032) (\$MN)

Table 26 Global Carbon Capture Materials Market Outlook, By Technology (2024–2032)

(\$MN)

Table 27 Global Carbon Capture Materials Market Outlook, By Pre-Combustion Capture

(2024–2032) (\$MN)

Table 28 Global Carbon Capture Materials Market Outlook, By Post-Combustion

Capture (2024–2032) (\$MN)

Table 29 Global Carbon Capture Materials Market Outlook, By Oxyfuel Combustion

(2024–2032) (\$MN)

Table 30 Global Carbon Capture Materials Market Outlook, By Direct Air Capture (DAC)

(2024–2032) (\$MN)

Table 31 Global Carbon Capture Materials Market Outlook, By End User (2024–2032)

(\$MN)

Table 32 Global Carbon Capture Materials Market Outlook, By Power Generation

(2024–2032) (\$MN)

Table 33 Global Carbon Capture Materials Market Outlook, By Oil & Gas (2024–2032)

(\$MN)

Table 34 Global Carbon Capture Materials Market Outlook, By Chemical &

Petrochemical (2024–2032) (\$MN)

Table 35 Global Carbon Capture Materials Market Outlook, By Cement & Steel

Manufacturing (2024–2032) (\$MN)

Table 36 Global Carbon Capture Materials Market Outlook, By Metal & Mining

(2024–2032) (\$MN)

Table 37 Global Carbon Capture Materials Market Outlook, By Industrial Processes

(2024–2032) (\$MN)

Table 38 Global Carbon Capture Materials Market Outlook, By Other End Users  
(2024–2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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