

# CO2 Transport Infrastructure Market Forecasts to 2034 – Global Analysis By Component (Pipelines & Networks, Storage Terminals, Transport Vessels and Monitoring Equipment), Transport Mode, Technology, Application, End User and By Geography

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## Abstracts

According to Statistics MRC, the Global CO2 Transport Infrastructure Market is accounted for \$1.2 billion in 2026 and is expected to reach \$2.9 billion by 2034 growing at a CAGR of 11.6% during the forecast period. CO2 transport infrastructure refers to the physical network assets, equipment, and associated monitoring and control systems required to move captured carbon dioxide from industrial emission sources to permanent geological storage sites or utilization facilities. It encompasses dedicated CO2 pipeline networks, compression and pumping stations, ship-based CO2 transport vessels for offshore and international transport routes, onshore and offshore CO2 storage terminals and injection facilities, and real-time pipeline integrity monitoring and leak detection systems.

### Market Dynamics:

#### Driver:

CCUS Infrastructure Cluster Development

CCUS infrastructure cluster development programs linking multiple industrial emitters to shared CO2 transport and storage infrastructure are the primary driver of CO2 transport investment, as shared infrastructure economics dramatically reduce per-tonne capture and transport costs compared to dedicated single-source project configurations. European industrial clusters including the Northern Lights project in Norway, HyNet in

the UK, and Rotterdam Carbon Hub are establishing commercial shared infrastructure models that are attracting industrial emitter participation. Government co-investment in CO<sub>2</sub> transport backbone networks is reducing first-mover infrastructure risk and creating platform conditions for progressive industrial emitter connection expansion.

**Restraint:****Regulatory and Permitting Complexity**

Regulatory and permitting complexity for CO<sub>2</sub> pipeline infrastructure construction and offshore geological storage operations represents a significant project timeline and cost barrier, as cross-jurisdictional regulatory frameworks for CO<sub>2</sub> transport classification, safety standards, and liability regimes remain underdeveloped in most markets. Onshore CO<sub>2</sub> pipeline routing faces public acceptance challenges analogous to natural gas infrastructure siting controversies. Offshore permanent CO<sub>2</sub> storage permitting requires extensive geological characterization and long-term liability acceptance from host country governments, creating sovereign policy dependencies that complicate project financing and investor commitment for long-duration infrastructure assets.

**Opportunity:****Offshore CO<sub>2</sub> Storage Network Expansion**

Offshore CO<sub>2</sub> geological storage network expansion in the North Sea, Norwegian Continental Shelf, and other proven sedimentary basins presents a transformational infrastructure development opportunity as European industrial decarbonization mandates create growing demand for permanent CO<sub>2</sub> sequestration capacity. Multiple offshore CO<sub>2</sub> storage project development programs are in active permitting and financing stages, requiring substantial subsea pipeline, injection well, and monitoring infrastructure investment. First-mover infrastructure developers securing offshore storage licenses and building transport network connections are establishing strategic competitive moats in European industrial CCUS supply chains.

**Threat:****Public Acceptance and Safety Concerns**

Public acceptance challenges and safety concerns regarding onshore CO<sub>2</sub> pipeline

infrastructure routing and high-pressure storage facility siting represent project development risks that can cause significant delays, route modifications, and cost escalations for CO<sub>2</sub> transport infrastructure projects. Incidents involving CO<sub>2</sub> pipeline ruptures and high-concentration CO<sub>2</sub> exposure hazards have heightened community opposition to new pipeline corridors. Emergency response planning requirements and safety buffer zone regulations for CO<sub>2</sub> infrastructure sites create additional land use complexity that constrains preferred routing options and elevates project development costs in densely populated industrial regions.

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

COVID-19 had limited direct impact on CO<sub>2</sub> transport infrastructure development given the sector's pre-commercial status during the pandemic period, but post-pandemic green recovery stimulus substantially accelerated government commitments to CCUS cluster development programs that generate CO<sub>2</sub> transport infrastructure investment demand. Pandemic-era supply chain analysis highlighted the strategic importance of domestic low-carbon industrial transformation, strengthening political support for large-scale CCUS infrastructure co-investment programs that are materializing as project construction pipelines.

The monitoring equipment segment is expected to be the largest during the forecast period

The monitoring equipment segment is expected to account for the largest market share during the forecast period, due to mandatory deployment across all CO<sub>2</sub> pipeline and storage facility types for regulatory compliance, leak detection, and pressure integrity verification. Advanced fiber optic distributed sensing systems, satellite-based CO<sub>2</sub> detection, and real-time wellhead monitoring platforms are required throughout the CO<sub>2</sub> transport infrastructure value chain from capture facility outlet to geological storage formation. Growing regulatory requirements for continuous monitoring and reporting of CO<sub>2</sub> storage site integrity are expanding the monitoring equipment deployment scope and creating substantial recurring consumables and service revenue streams.

The pipeline transport segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the pipeline transport segment is predicted to witness the highest growth rate, driven by large-scale CO<sub>2</sub> transport network construction programs in Europe and North America linking industrial emitter clusters to offshore and onshore

geological storage sites. Pipeline infrastructure offers the most cost-effective CO2 transport economics at volumes generated by industrial cluster configurations, creating strong investment justification for shared infrastructure networks. Government financing for backbone CO2 pipeline corridor development is reducing private sector investment risk and accelerating project timelines across multiple major CCUS cluster programs simultaneously.

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

During the forecast period, the Europe region is expected to hold the largest market share, due to advanced CO2 transport and storage regulatory frameworks, active offshore CO2 storage project development in the North Sea and Norwegian Continental Shelf, and substantial government co-investment in industrial CCUS cluster infrastructure. Norway's Northern Lights CO2 transport and storage project represents the world's first commercial cross-border CO2 shipping and offshore storage operation, establishing infrastructure precedent. European industrial emitters facing the highest carbon prices globally have the strongest economic incentive for CO2 transport infrastructure utilization.

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

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to growing industrial CCUS program development in Japan, South Korea, and Australia, government investment in domestic CO2 transport infrastructure feasibility and pilot programs, and emerging offshore CO2 storage capacity development. Japan's CCUS roadmap includes dedicated CO2 shipping and offshore storage infrastructure investment targets. Australia's substantial offshore geological storage potential and government CCUS support programs are attracting infrastructure development investment from domestic and international energy companies.

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

Some of the key players in CO2 Transport Infrastructure Market include Enbridge Inc., TC Energy, Kinder Morgan, Williams Companies, Snam S.p.A., Gazprom, Shell Plc, ExxonMobil, TotalEnergies, Equinor ASA, Aker Solutions, Saipem, Technip Energies, Worley, McDermott International, Baker Hughes, Schlumberger, and Linde Plc.

### **Key Developments:**

In March 2026, Technip Energies secured an engineering contract for subsea CO<sub>2</sub> pipeline and injection manifold infrastructure connecting the HyNet North West industrial cluster to offshore storage.

In February 2026, Aker Solutions completed front-end engineering for a large-scale offshore CO<sub>2</sub> injection system designed for permanent geological sequestration in the Norwegian Continental Shelf.

In January 2026, Equinor ASA commenced first commercial CO<sub>2</sub> injection operations at its Northern Lights offshore storage site, accepting industrial CO<sub>2</sub> shipments from Belgian cement and waste-to-energy facilities.

#### Components Covered:

Pipelines & Networks

Storage Terminals

Transport Vessels

Monitoring Equipment

#### Transport Modes Covered:

Pipeline Transport

Shipping Transport

Road Transport

Rail Transport

#### Technologies Covered:

Compression Technologies

Liquefaction Technologies

Monitoring & Safety Systems

Storage Integration Systems

Applications Covered:

Carbon Capture & Storage (CCS)

Carbon Utilization

Enhanced Oil Recovery (EOR)

Industrial Emission Transport

End Users Covered:

Oil & Gas Companies

Power Generation Companies

Industrial Manufacturers

Government & Infrastructure Bodies

Other End Users

Regions Covered:

North America

United States

Canada

Mexico

## Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

## Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of 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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

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

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