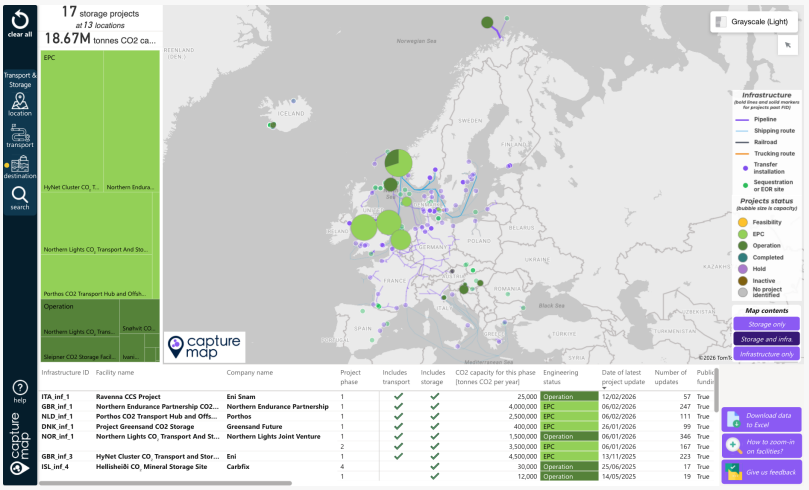
CaptureMap Analysis Challenges the View That Storage Is the Primary Bottleneck in European CCUS

New CaptureMap data points to value chain alignment — not storage volume — as the more critical constraint in European CCUS development.



Storage projects past FID in CaptureMap: 17 projects, representing 18.7 mtpa of announced injection capacity

OSLO, NORWAY, March 11, 2026 /EINPresswire.com/ -- The claim that "storage is the bottleneck" has become a common refrain in discussions about carbon capture, utilization and storage (CCUS) development in Europe. New analysis from CaptureMap, the industry standard for CCUS market intelligence, suggests the picture is more complex.

CaptureMap currently tracks 117 storage projects across Europe. Of these, approximately 19 million tonnes per annum (mtpa) of CO injection capacity — less than 5% of total announced storage capacity — has passed Final Investment Decision (FID). On the surface, this appears to reinforce the view that storage is lagging.

Yet data from the capture side tells a different story.

According to CaptureMap, 98 commercial-scale capture projects in Europe have passed FID, representing approximately 15.9 mtpa of capture capacity. Of this total, around 9.7 mtpa across 21 projects is linked to geological storage, while approximately 6.1 mtpa across 69 projects is directed toward CO utilization pathways. At an aggregated European level, storage capacity that has passed FID slightly exceeds capture volumes intended for geological storage — suggesting that in some parts of the market, storage may in fact be ahead.

Alignment, Not Volume Alone

The analysis indicates that the central challenge in European CCUS is not simply insufficient storage or capture capacity. It is alignment across the value chain.

Storage locations do not always match emitter clusters. Pipeline and shipping infrastructure

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>
> *Eric Rambech, Co-founder and Commercial Lead, Endrava*

timelines do not always progress in step with capture project development. Emitters often face regulatory or funding deadlines that do not align with storage commissioning schedules.
This challenge is becoming more urgent in light of the EU Net-Zero Industry Act, which sets a target of 50 mtpa of operational CO injection capacity by 2030. While the approximately 19 mtpa of storage capacity already past FID marks meaningful progress, it also underscores the scale of acceleration still required.

The pieces of the puzzle are emerging — but they do not automatically move together.

A System-Level View of CCUS

Assessing whether storage is truly a bottleneck requires more than counting projects. It requires understanding how multiple layers of the value chain interact: emitter maturity and capture readiness, transport infrastructure development, storage capacity and FID status, geographic proximity and cross-border routing, and regulatory timelines.

CaptureMap is designed to provide that integrated perspective. The platform combines emissions data, capture projects, and transport and storage infrastructure into one structured and continuously updated system. By visualizing engineering stages, sanctioned capacities, transport routes, and source-linked documentation, it enables stakeholders to identify where CCUS value chains are aligned — and where gaps remain.

"Aggregated numbers can be misleading," said Valentin Vandenmolden, Co-founder and Technical Lead at Endrava. "The real question is not whether Europe has storage or capture. It's whether the right storage is available for the right emitters at the right time."

Eric Rambech, Co-founder and Commercial Lead, added: "The narrative around bottlenecks often oversimplifies a very complex system. Storage is progressing — but coordination across the value chain remains the core challenge. That's precisely why integrated CCUS intelligence matters."

Europe as a Test Case

CaptureMap provides global coverage of CO emitters and capture projects, while its transport and storage infrastructure functionality is currently focused on Europe — deliberately so. Europe represents one of the most structurally complex CCUS markets in the world, shaped by cross-border shipping, offshore storage hubs, state-backed industrial clusters, and regulated storage

capacity obligations. It serves as a critical test case for understanding how large-scale CCUS systems can be coordinated in practice. CaptureMap is also expanding infrastructure coverage into additional regions, including North America.

Moving Beyond the Bottleneck Debate

The question of whether capture or storage leads development may miss the broader issue.

CCUS deployment is no longer constrained by ambition alone. It is increasingly constrained by coordination — and coordination depends on visibility across the full system.

CaptureMap aims to provide that system-level intelligence by connecting more than 29,000 industrial emitters, nearly 1,500 capture projects, and Europe’s developing transport and storage network within a single transparent framework.

In CCUS, the challenge is not only building projects. It is making the pieces move together.

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