2026 BRIEF

# CCUS STATUS IN FRANCE : AN UPDATE

MAY 2026

GLOBAL CCS INSTITUTE


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**FRANCE IS BUILDING MOMENTUM BEHIND CCUS DEPLOYMENT, BUT ACCELERATING INFRASTRUCTURE, STORAGE AND PUBLIC CONFIDENCE WILL BE CRITICAL TO MEETING ITS LONG-TERM DECARBONISATION AMBITIONS.**

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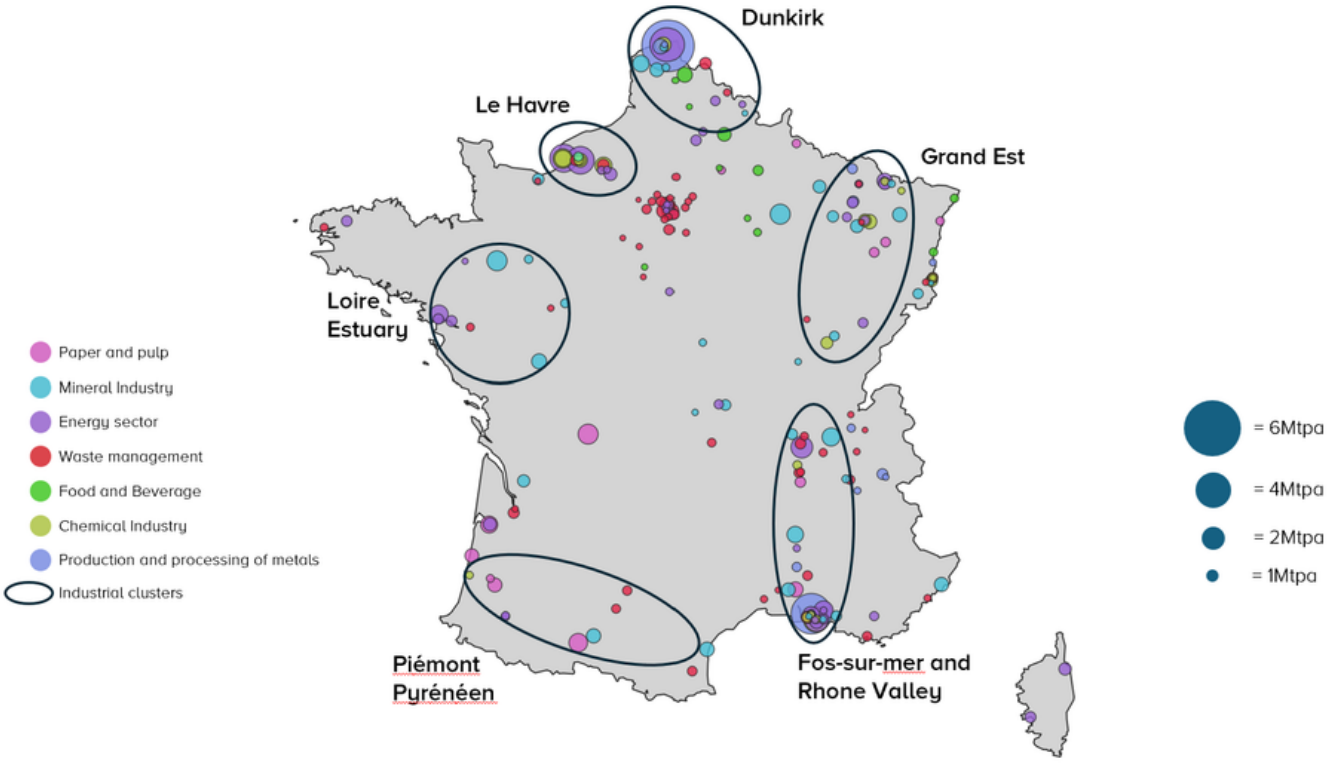
**Policy Update**
May 2026

Since the Institute's publication on the status of CCUS in France in July 2024 (GCCSI, 2024), the policy and project landscape in the country has continued to evolve, with growing momentum behind efforts towards CCUS deployment. This update provides an overview of recent developments and the gaps that remain.

## Current landscape

In 2024, major industrial sites in France emitted **71.3 million tons of $CO_2$ ($MtCO_2$)** (E-PRTR, 2025), relative to the country's total emissions of 378.1$MtCO_2e$ (EC, 2025). Carbon capture, utilisation and storage (CCUS) represents a key potential decarbonisation pathway for many in France's large industrial base, such as those in the cement, steel and chemical industries. France's national CCUS strategy, published in July 2024, sets a clear long- term goal of 30-50Mtpa of $CO_2$ captured by 2050 and underscores the critical role the technology will play in meeting decarbonisation ambitions in the country (Ministere de l'Economie, 2024). Since the publication of its national CCUS strategy, significant progress has been made in developing enabling policies and the supporting regulatory framework to support CCUS deployment, but several gaps remain.

**Figure 1: Major $CO_2$ emitting sites in France**




***Source: emissions data from E-PRTR (2025)***

In December 2025, the French government released a draft of its 3rd Low-Carbon National Strategy (SNBC 3), outlining a strengthened pathway to climate neutrality, including a 50% economy-wide emissions reduction target by 2030 (up from 40% under SNBC 2) and a 68% reduction target for industrial emissions compared to 1990 levels (SNBC 3, 2025). This decarbonisation pathway aims to guide collective action to reach the emission reduction targets, where 4.4Mtpa of $CO_2$ is captured by 2030, with 3.4Mtpa coming from CCS, 0.4 Mtpa from BECCS and 0.6 Mtpa from BECCU. The pathway estimate for $CO_2$ capture is consistent with France's national CCUS strategy deployment goal, which targets capture of 4–8 Mtpa of $CO_2$ by 2030 (Ministere de l'Economie, 2024), and reinforces both the expectation that CCUS will play a material role in meeting emissions reduction targets and the notion that without CCUS, France is likely to miss its stated decarbonisation goals. CCUS project development is accelerating in France, with 6 $CO_2$ capture projects currently in development and expected to become operational by 2030 (Table 1) with a projected capture capacity of 3.75Mt$CO_2$ per year (GCCSI $CO_2$RE database). These capture projects are concentrated in northern and western industrial clusters, which have good access to North Sea storage sites. While positive progress, these capture projects alone will not be enough to meet France's stated target of 4-8Mtpa CCUS by 2030 (Ministere de l'Economie, 2024). Additional efforts are therefore needed to accelerate deployment rates to the necessary levels.

## Legislative overview

Since GCCSI's last publication on the status of CCUS in France in July 2024 (GCCSI, 2024), the country has taken significant steps to establish the necessary regulations to enable CCUS projects and accelerate deployment. In particular, progress is advancing in the following three areas:

### Financing

The French Government has designed and implemented the first round of a state aid program, the Big Industrial Decarbonisation Projects (GPID), to subsidise additional decarbonisation costs borne by emitters to help reduce revenue uncertainty for industrial decarbonisation projects (EC, 2024). With CCS included in the scope, this represents France's first revenue support mechanism which supports the deployment of the technology. Seven projects were selected in the first round and will receive €1.6 billion over 15 years, 4 of which are CCS projects, representing 3.45Mtpa of "avoided $CO_2$" (Direction generale des Entreprises, 2026). In preparation for the second round of tenders planned for 2026, a public consultation was launched in June 2025 to refine the design of the support mechanism (Ministere de la Transition Ecologique, 2025). It is important to note that, as the GIPD is designed to support the decarbonisation in hard-to-abate sectors, it is limited to industrial sites subject to the EU ETS. Consequently, CCUS projects in other sectors, such as power generation, are not eligible for government revenue support.

Project Porthos. Credit: Air Liquide

**Table 1: French CCUS projects**

| Project name | Project type | Principal developer | Operational start date | Capture capacity (Mtpa) | Funding source |
|---|---|---|---|---|---|
| VAIA Vicat | Capture | VICAT | Under Evaluation | 1.2 | EU Innovation Fund; GIPD |
| Airvault GOCO$_2$ | Capture | Heidelberg Materials | 2030 | 1 | EU Innovation Fund; GIPD |
| Holcim St Pierre La Cour | Capture | Holcim | 2030 | 1 | GIPD |
| K6 | Capture | EQIOM | 2028 | 0.8 | EU Innovation Fund |
| CalCC | Capture | Lhoist | 2028 | 0.6 | EU Innovation Fund |
| Aluminium Dunkerque (C4capture) | Capture | Aluminium Dunkerque | 2030 | 0.25 | GIPD |
| RepAir Carbon Oak | DAC | RepAir | 2030 | 0.1 | - |
| Martres-Tolosane Cement plant | Capture | Holcim | Under Evaluation | Under Evaluation | CEF |
| ECO$_2$ Normandy | Transport and storage | Air Liquide | 2028 | - | CEF |
| GOCO$_2$ | Transport and storage | Elengy | 2030 | - | CEF |
| D'Artagnan Dunkirk CO$_2$ hub | Transport and storage | Arcelor Mittal | 2028 | - | CEF |
| Rhone CO$_2$ | Transport and storage | Elengy | Under Evaluation | - | - |
| Aluminium Dunkirk CO$_2$ transport | Transport | GRT gaz | Under Evaluation | - | - |

***Source: GCCSI CO$_2$RE database***

## $CO_2$ Transport

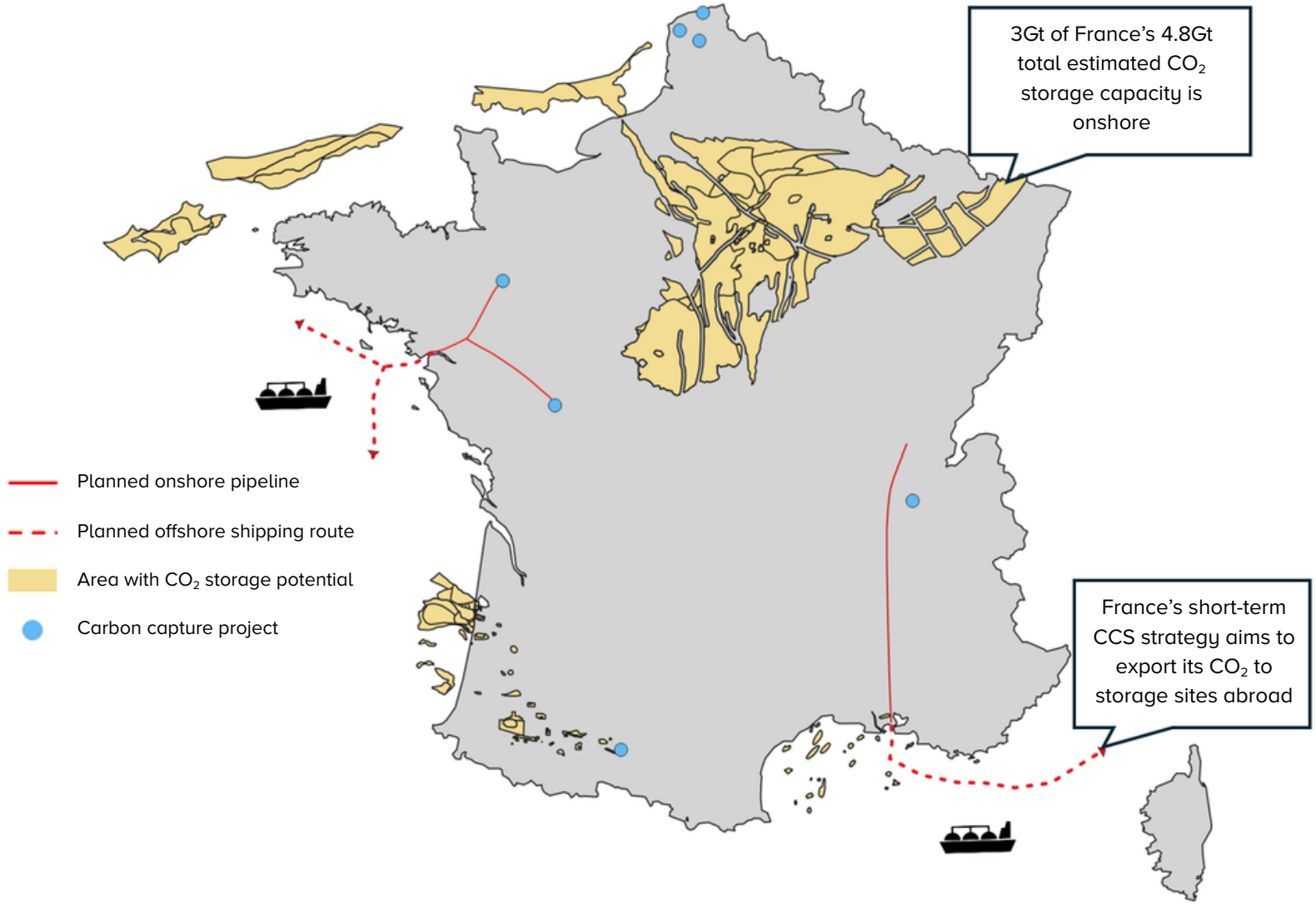
Whilst France's longer-term CCUS deployment strategy initially targets 7 industrial hubs, the stated short-term (2025-2030) approach of transporting captured $CO_2$ to storage in other countries (Ministere de l'Economie, 2024) means current efforts are concentrated on establishing France as a $CO_2$ exporter. As a result, prioritisation has been given to developing CCUS clusters located near existing port infrastructure. The coastal hubs of Dunkirk, Fos-sur-Mer, Le Havre and Loire Estuary (see Figure 1) were the first to be designated as Zones Industrielles Bas Carbone (ZiBAC) and therefore received early development support (Ministere de l'Economie, 2023). This designation encouraged the clusters to begin developing $CO_2$ transport projects such as Rhone $CO_2$ and $GOCO_2$, the latter of which commenced its FEED studies in late 2025 (Natran, 2025). The aim of these two projects is to develop local $CO_2$ transportation networks that can link into wider cross-border $CO_2$ corridors such as that associated with the Ravenna storage hub in Italy (Elengy, 2025). Despite this export-oriented approach, a recent national study estimated France to have a total of 4.8Gt, both onshore and offshore, of potential $CO_2$ storage capacity (EVASTOCO2, 2025), although this currently remains largely undeveloped.

Clear rules around $CO_2$ transport are essential for the development of shared transport networks, which enable economies of scale and are critical to scale CCUS efficiently. With 4-8Mtpa of captured $CO_2$ set to need transport and storage by 2030, France has been making progress in establishing a regulatory framework for $CO_2$ transport infrastructure, launching the first public consultation in late 2025 (Ministere de la Transition Ecologique, 2025) which outlines plans for an open and non-discriminatory network with negotiated third-party access. Alongside developing domestic regulations for $CO_2$ transport, France ratified the 2009 London Protocol Amendment, officially enabling it to export $CO_2$ for permanent geological storage (IEAGHG, 2025). In June 2025, the country signed a bilateral agreement with Norway on the cross-border movement and storage of $CO_2$ (Ministry of Energy, 2025), building off a similar agreement signed with Denmark in March 2024 (ICSC, 2024).

## Low-carbon procurement

National efforts to make CCUS commercially viable have been complemented by EU-wide policy developments aimed at supporting low-carbon manufacturing. The Clean Industrial Deal (CID), announced by the EU Commission in February 2025, seeks to strengthen the competitiveness of European clean industry by mobilising up to €100bn to help create strong demand for EU low-carbon industrial products (EC, 2025). Complementing this, the EU Industrial Accelerator Act, published in March 2026, plans to introduce mandatory minimum quotas for public procurement of low-carbon products to reinforce market demand (EC, 2026). Under the Act, at least 25% of steel and aluminium materials and dependent products would need to qualify as "low carbon", with a 5% threshold for concrete and mortar. This demand-side signal is further reinforced by France's Green Public Procurement (GPP) framework which requires environmental criteria to be incorporated into public contracts (Climate and Resilience Law, 2021). Taken alongside the EU CBAM, which came into force on January 1st 2026 and aims to protect EU manufacturers from low-priced imports from regions with less stringent environmental regulations (EC, 2026), these policies strengthen market incentives for low-carbon industrial production pathways, including those reliant on CCUS.

## Figure 2: Location of planned CCUS projects in France, and areas with $CO_2$ storage potential




***Source: $CO_2$ storage potential data from EVASTOCO2 (2025), planned $CO_2$ transport routes data from Elengy (2025) and NATRAN (2025)***

## What next?

Beyond 2030, France's CCUS strategy enters a second phase of deployment scale-up, with $CO_2$ capture targets of 12-20Mtpa by 2040 (Ministere de l'Economie, 2024) implying a significant expansion in CCUS deployment. As shown in Table 1 earlier, a number of CCUS projects are planned to come online after 2030, however, these alone are unlikely to be sufficient to meet the target range.

As highlighted by the national $CO_2$ storage capacity study mentioned earlier, France has significant theoretical storage potential. Although the storage capacity mapping is an important early step in enabling domestic $CO_2$ storage, further action towards developing individual storage sites needs to be taken if France wants to avoid project bottlenecks as deployment accelerates.

Public perception of CCUS continues to evolve in France. In 2024, the PYCASSO project, an initiative which aimed to develop the country's first commercial scale onshore $CO_2$ storage site, was paused due to local concerns (Carbon Herald, 2024). This setback highlights the importance of constructive, continuous and transparent dialogue with local stakeholders and creates an opportunity for France to strengthen public confidence in future CCUS initiatives. With timely stakeholder engagement and clearer long-term governance signals, public trust can be enhanced, supporting the broader deployment of CCUS in France (France ciment, 2025).

Port-Jerome. Credit: Air Liquide

## What progress has been made?

In 2024, the Global CCS Institute published a report on the status of CCUS in France containing recommendations across critical areas to address identified gaps and help facilitate the deployment of CCUS. The table below provides an indication of the level of progress made since the publication.

| 2024 Recommendation | Developments since 2024 report | Comments on potential impact | Progress to date |
|---|---|---|---|
| **CCUS support across all sectors** | Industrial installations under the EU ETS are now eligible for state aid, however there is no French government support for CCS deployment in other sectors or $CO_2$ transportation and storage projects | Excluding sectors, such as the power sector, from government support delays CCS scale-up | Progressing well with some exceptions |
| **Development of an enabling regulatory framework to accelerate CCUS deployment** | $CO_2$ transport regulation framework launched | Ensuring an enabling regulatory framework is established for the whole value chain provides confidence and clarity to CCS stakeholders | Progressing well |
| **Establishing regulatory framework and incentives to enable CDR deployment** | Mentioned in the CCUS national strategy but no incentives in place specifically to encourage CDR deployment | Limited CDR deployment reduces the potential for project support from the wider carbon market participants, potentially weakening the CCUS scaling pace. | Limited progress |

| 2024 Recommendation | Developments since 2024 report | Comments on potential impact | Progress to date |
|---|---|---|---|
| **Improving EU and national funding coordination** | Emerging synergies between state aid scheme and EU-level support following the establishment of the GPID | Increase in funding support helps CCS projects reach commercial deployment | Progressing well |
| **Development of a dedicated and comprehensive T&S regulation** | London Protocol Amendment accepted; transport consultation launched | Clear and transparent rules and regulations to $CO_2$ transportation increases investor confidence | Progressing well |
| **Facilitating CCUS value chain coordination** | $CO_2$ transport regulation is in development; no storage development | Risk of project bottlenecks and delays FID | Progressing well with some exceptions |
| **Continuing fostering public-private forms of cooperation and establishing risk-sharing mechanisms among the parts of the value chain** | Public consultations on both $CO_2$ transportation regulatory framework and state aid scheme; no risk-sharing mechanisms in place as of yet | Risk-sharing mechanisms increase investor confidence and lower barriers to entry | Progressing well with some exceptions |
| **Building a positive CCUS public perception** | PYCASSO project halted due to local pushback | Slows CCS deployment and impedes domestic storage development | Limited progress |

Since our last publication, France has made meaningful progress in advancing CCUS, and the release of France's national strategy is especially encouraging. However, several gaps still remain, particularly in domestic storage development, public acceptance and limited progress on risk-sharing mechanisms.

To keep pace with its interim decarbonisation and to keep pace with its interim decarbonisation and capture targets, France must continue to accelerate project deployment, unlock storage site development and effectively implement $CO_2$ transport to enable cross-sector participation.

Clear governance, sustained funding coordination, catalytic public procurement and proactive stakeholder engagement will be essential to translate policy progress into large-scale, timely CCUS deployment.

## Glossary

| Term | Definition |
|---|---|
| **SNBC** | Strategie Nationale Bas-Carbone (National Low-Carbon Strategy) |
| **CEF** | Connecting Europe Facility |
| **GIPD** | Grand Projets Industriels de Decarbonation (Large Industrial Decarbonisation Projects) |
| **ZIBaC** | Zones Industrielles bas carbone (Low-carbon idustrial zones) |
| **FEED** | Front End Engineering Design |
| **CBAM** | Carbon Border Adjustment Mechanism |
| **NZIA** | Net-Zero Industrial Act |

*__Context:__ The topics addressed in this factsheet follow the important information and insights gathered during the Global CCS Institute members' meeting held in Dunkirk at the beginning of 2026. Discussions with a range of key French CCS stakeholders provided up-to-date perspectives that have informed the analysis presented in this paper.

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