Exolum's role in CO_2 Logistics Development

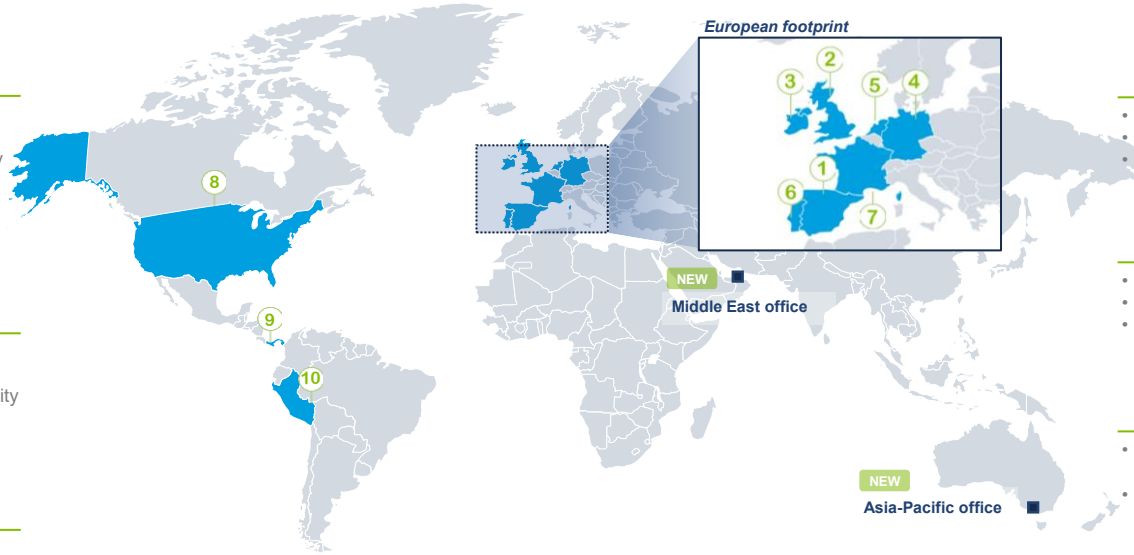
DS 2026 -Bilbao



November 2026

Europe's leading liquid products logistics operator, with a presence across 10 countries and expanding its footprint to become a global operator

1st logistic operator of liquid products in Europe and one of the largest in the world	**99** years of experience	**+2,300** professionals	**6,000** km of pipelines	**67** storage terminals	**51** airport facilities	**11M** cubic metres of capacity



1 Spain

- **4,000 km** of oil pipelines
- **39 storage** terminals
- **8 million m3** of storage capacity
- **13** port facilities
- **37 airport** facilities (1 pre-COD)
- **6 hydrant** networks

2 United Kingdom

- **2,000 km** of oil pipelines
- **24 storage** terminals
- **2.5 million m3** of storage capacity
- **1 airport** facility pre-COD

3 Ireland

- **2 airport** facilities
- **1 hydrant** network

4 Germany

- **2 storage** terminals
- **315,000 m3** of storage capacity
- Multi modal logistics
- **1 airport** facility pre-COD

5 The Netherlands

- **1 storage** terminal
- **614,000 m3** of storage capacity

6 Portugal

- **2 airport** facilities
- **12.058 m3** of storage capacity
- **1 hydrant** network

7 France

- **1 airport** facility
- **1 hydrant** network
- Operations started in 2025

8 United States

- **1 storage** terminal: 50% Exolum – 50% Royal Vopak
- Storage capacity: 30,000 tons of ammonia and 14,3 MBbls of NGL

9 Panama

- **6 airport** facilities
- **18,000 m3** of storage capacity
- **1 hydrant** network

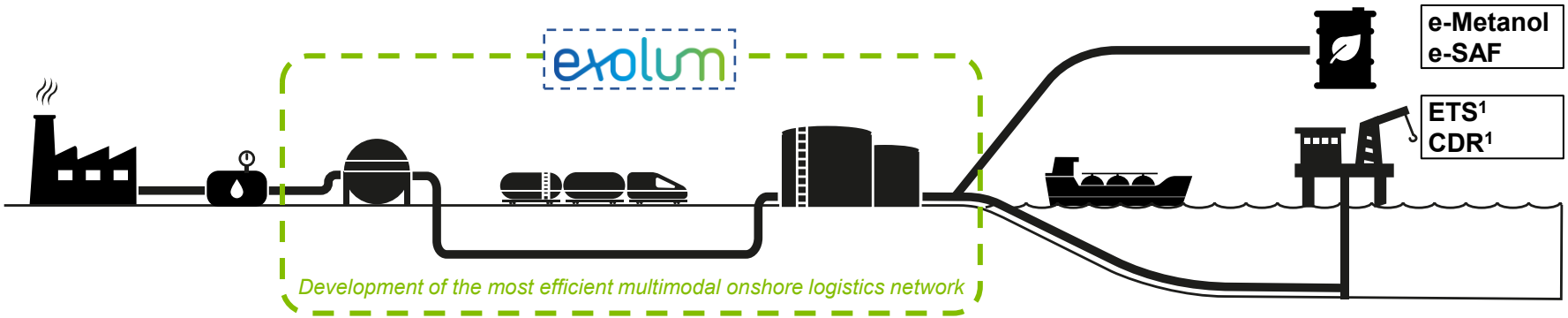
10 Peru

- **1 airport** facility
- **34,800 m3** of storage capacity
- **1 hydrant** network

Building a Large-Scale CO2 Logistics Network Through Hubs

Exolum develops the infrastructure that enables industrial decarbonization

Capture | **Onshore Storage and Transportation** | **Maritime Transport** | **Utilization and Storage**



Leading Logistics Partner

Proven expertise in liquid logistics and energy infrastructure.

Capabilities directly applicable to the efficient transportation of liquefied CO_2.

Hub-Based Logistics

Aggregation hubs at intermediate locations and ports to consolidate CO_2 volumes.

Optimized logistics through rail, road or pipeline, leveraging existing infrastructure to reduce costs.

Enabling Industrial Decarbonization

A pathway to decarbonization for hard-to-abate industries.

Enhancing competitiveness and industrial activity in strategic regions.

Collaboration Ecosystem

Collaboration with key stakeholders across the entire value chain.Established partnerships with emitters, Técnicas Reunidas, Adif, shipping companies, storage operators, railway companies and other strategic partners.

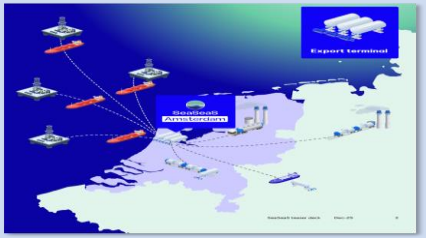
:

Development of a multimodal logistics network based on hubs, using the most efficient transport mode in each case.

[1] ETS:European Union Emissions Trading Scheme. CDR: Carbon dioxide removal

We are building the logistics for CO_2, through our project portfolio

SeaSeaS Amsterdam



Participation in an open-access , CO2 terminal development In the Port of Amsterdam connecting industrial emitters, both local and from Germany , to North Sea storage infrastructure

SeaSeaS is being developed as a flexible and scalable hub capable of serving multiple customers through multimodal logistics.

Eco2Fly



Logistic partner of Eco2fly, project decarbonisation of two hard-to-abate sectors, aviation and cement, together with Holcim and Ignis PTX.

Project can produce up to 100,000 Tn/yr of e-saf , through methanol to jet. Exolum manages the CO2 and e-saf logistics for the project

Portex Atlantic CO2



Developing a multimodal CO2 corridor connecting by rail industrial emitters in Spain and Portugal with a terminal located a the port of Coruña. The terminal will aggregate CO2 volumes for shipping to permanent geological North Sea storage infrastructure

Exolum 7CO2



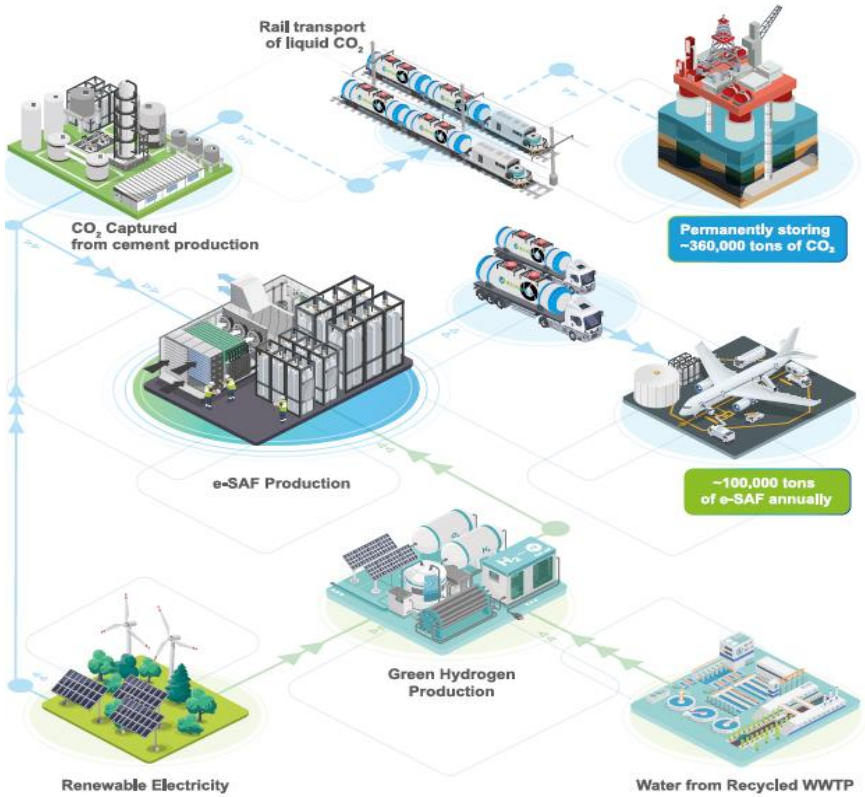
CO_2 capture and storage (CCS) hub, transporting captured CO_2 from local and regional industries to Bristol Avonmouth docks, where it is liquefied, temporarily stored and loaded onto ships for transport to permanent geological storage sites

Logistic partner of Eco2fly, project to decarbonize two hard-to-abate sectors, aviation and cement

Three leading actors joined to develop ECO2FLY, a Power-to-Liquid project to decarbonise the cement and air transport sectors

ECO2FLY

- **Consortium: Holcim, Ignis P2X and Exolum**
- **A Key Location.** Targeting one of the most dynamic markets in Spain, Madrid Region and 70 kms from Madrid Airport Hub
- **Full decarbonisation** of one of the largest point-source CO_2 emitters in Spain. (aprox **700,000tpy of CO_2)**
- **Low-cost renewable energy.** Access to low-cost renewable power, collocated and connection to Spanish national grid
- Existing direct **rail connection ensures reduced logistics costs.**
- **Water access:** recycled water connection from WWTP.
- **Land availability** (More than 10Ha)
- **Awardee - 'IF 25 - Large-Scale Projects**



exolum

PORTEX Atlantic CO_2: Spain-Portugal cross-border corridor for industrial decarbonisation

Multimodal infrastructure connecting Iberian emitters with geological storage sites in the North Sea

Portex Atlantic CO_2



Project Overview:

- **A Spain-Portugal cross-border corridor** for the aggregation and export of CO_2 from industrial emitters located in north-western Iberia.
- **Multimodal transport** by rail and truck to intermediate logistics terminals (Lousado) and to the **maritime terminal at the Port of A Coruña**, currently under environmental permitting.
- Maritime transport to **European geological storage facilities in the North Sea, already operational or in advanced stages of development.**

Main figures:

- **Capacity to decarbonise more than 2.4 Mtpa, with advanced discussions underway with eight emitters from hard-to-abate and biogenic sectors.**
- **Port storage capacity of up to 50,000 m³, developed in phases, starting with 30,000 m³ in 2030-2032.**

Objectives:

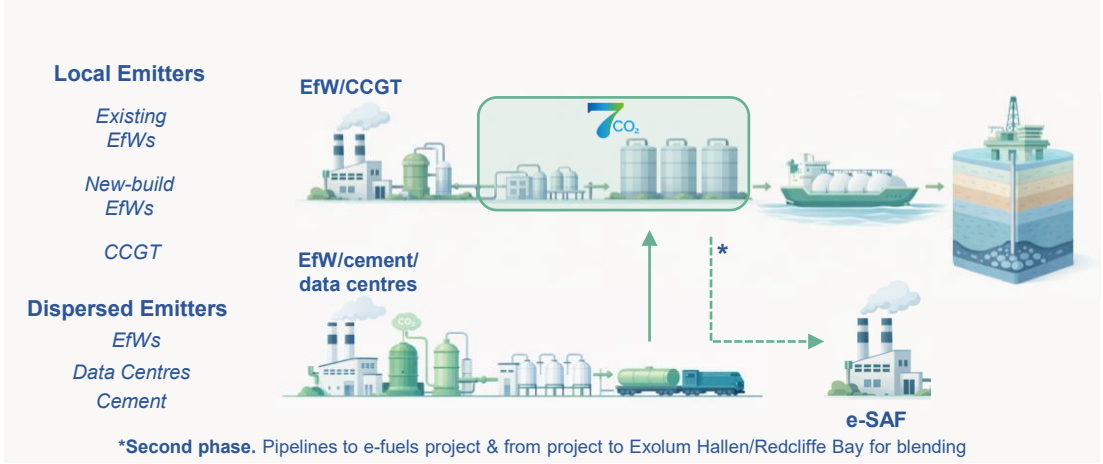
- Contributes to the **integration of Spain and Portugal into the emerging European carbon management economy.**
- Supports the **decarbonisation of strategic industrial sectors**, including hard-to-abate and biogenic emitters.
- Provides a **flexible and competitive CO_2 transport solution capable of adapting to growing demand and the future development of European networks.**
- **Supports industrial activity, investment and employment** while contributing to European climate objectives.

[1] The total CO_2 potential within the project's catchment area is approximately 9 million tonnes per year.

Exolum 7CO2 Project

Building an "NPT" chain in the UK CCUS market

7CO2 includes gas pipeline from local emitters + liquefaction + storage + rail unloading facilities + maritime loading arm (phase 1)



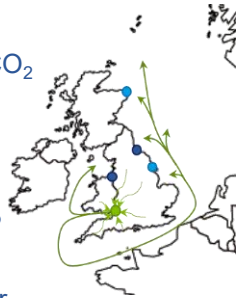
***Second phase.** Pipelines to e-fuels project & from project to Exolum Hallen/Redcliffe Bay for blending

Objectives

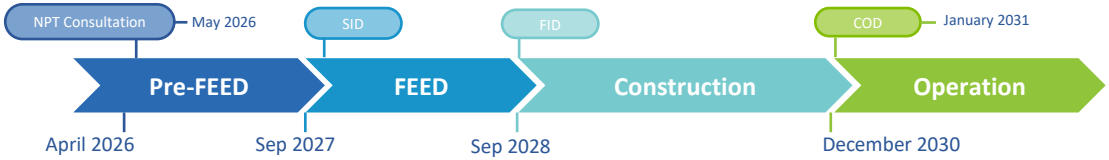
- **Develop a strategic CO_2 terminal** in Bristol enabling UK decarbonisation and CCS scale-up.
- **Support the UK Government's assessment of an** appropriate framework for "Non Pipeline Transport"
- **Develop** the project definition, attract government support via CfD and progress solid commercial agreements.

Project Overview:

- **Location**: Avonmouth, Bristol.
- **Storage Capacity:** 30,000 m^3 liquid CO_2
- **Throughput**: 1-6Mt/year of CO_2.
- **Means of transport**: Pipeline, Rail unloading facilities, 2 Jetties.
- **CO_2 conditioning**: Liquefaction & MP Storage
- **Investment:** ~£200m, enabling further ~£1bn in SAF



Project Timeline



A shared route forward for industry

Our goal: Give industrial emitters access to reliable, shared CCUS logistics, connecting capture with permanent storage and utilisation opportunities.

Exolum brings the infrastructure development and operating expertise.

Together with customers and partners, we can shape the connections industry needs.

Today's opportunity is to identify how our shared infrastructure can help enable capture plans move forward.



Thanks