

2025 Carbon Capture Coalition Annual Report



**CARBON CAPTURE
COALITION**

December 2025

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Message from the Executive Director

As we reflect on the past year for the Carbon Capture Coalition and a tumultuous year for clean energy policy more broadly, it's essential to understand where we began. President Trump and a congressional Republican majority were elected in 2024 on a platform of addressing inflation, reducing federal spending, and addressing the growing US deficit. As part of this platform, Republicans promised voters a full repeal of the Inflation Reduction Act (IRA), which included the mission-critical Section 45Q tax credit.

While we began 2025 hopeful that the historic bipartisan support for carbon management technologies would translate into preservation of the 45Q tax credit throughout the process that ultimately resulted in the 'One Big Beautiful Bill Act', we knew that we had a formidable task ahead of us. Despite an up-and-down year for clean energy and climate mitigation policies, Republicans ultimately endorsed and passed a domestic framework to catalyze the deployment of clean energy technologies well into the next decade and beyond. Now that 45Q is secured, we must advance common-sense policies to ensure the nationwide deployment of these essential technologies.

Despite these short-term challenges, thanks to collective efforts over the past several years, carbon management technologies now have a clear runway for deployment. Domestic projects are still moving forward and advancing toward final investment decisions. Project developers are securing Class VI wells; the number of primacy states now totals six, and the pipeline of announced projects continues to grow. Globally, the pace of progress continues to be impressive, and we can learn valuable lessons from states, countries, and regions across the globe on strong policies that are driving deployment.

We know that managing carbon emissions through carbon management technologies aligns closely with the administration's goals to provide abundant, reliable, and affordable energy supplies. We've spent 2025 communicating the value of carbon management technologies to Republicans and Democrats alike, highlighting their role in supporting domestic energy production, meeting surging demand for clean, firm power, providing cleaner energy and industrial products to our trading partners, and creating family-sustaining jobs for regional economies across the US.

We'll continue to listen to the signal and ignore the noise so we can best position the Coalition and our priorities into next year and beyond.

With gratitude for your partnership,



**Jessie Stolark, Executive Director,
Carbon Capture Coalition**



2025 Achievements

45Q PRESERVED AND ENHANCED

In 2025, the Coalition played a central role in securing the preservation and enhancement of the federal Section 45Q tax credit through the [One Big Beautiful Bill Act \(OBBBA\)](#). Thanks to sustained education and engagement with congressional champions and Republican leadership, the legislation preserves this mission-critical market signal for the deployment of carbon management technologies. Importantly, it maintains the ability to elect transferability for the lifetime of the credit and also creates long-sought parity between carbon utilization and geologic storage. Thanks in large part to the Coalition's efforts, Congress also rejected a proposal for harmful delays to inflation adjustments for 45Q, reflecting the broad, bipartisan recognition of 45Q's essential role in supporting domestic carbon management deployment.

These developments come at a pivotal moment, as the Coalition highlighted throughout 2025 the [impacts inflationary pressures](#) are having on project economics since the credit's last increase. With raw materials, labor, and capital costs rising sharply in recent years, and the real value of 45Q eroding as a result, these improvements position the credit for more substantial long-term effectiveness. The Coalition remains optimistic and firmly committed to ensuring that 45Q continues to serve as a strong, predictable market signal, enabling the broad deployment of carbon management technologies across the US economy.

"The Carbon Capture Coalition is the leading force behind policies to unlock the vast economic potential of the US carbon value chain. Climeworks is proud to be a Coalition member."

Andrew Fishbein, Climeworks



In 2025, the Coalition continued its work across three essential pillars to advance the portfolio of policies necessary for the commercial deployment of carbon management technologies.

- ➔ **Education:** Providing educational resources to Coalition members for their work in educating policymakers, media, and stakeholders on carbon management technologies.
- ➔ **Convening power:** Leveraging the expertise of staff, consultants, and members, the Coalition advanced its priorities across tax, regulatory, and implementation topics, as well as developing next-generation policy proposals through our [2025 Policy Blueprint](#) release.
- ➔ **Joint advocacy:** Coalition staff, consultants, and members have worked to advance key legislative priorities across tax, appropriations, and permitting reform, including the signature accomplishment of preserving and enhancing 45Q through the budget reconciliation process.

Education & Joint Advocacy

In 2025, the Coalition again demonstrated its convening power on Capitol Hill through our third annual Capitol Hill Day, building on our momentum established in recent years. More than 50 members from across our diverse Coalition joined together in Washington in March for nearly 30 meetings with key congressional offices, reinforcing the value of a unified, cross-sector voice for carbon management.

These meetings provide essential education to congressional staff on the role of carbon management in driving economic development, ensuring reliable American energy, and delivering emissions reductions—while highlighting our members’ continued efforts and our leadership in securing a strong 45Q, permitting reform, and FY26 appropriations.



“Joining the Carbon Capture Coalition has added tremendous value to our organization. The depth and breadth of information shared through the Coalition have significantly enhanced our understanding of carbon management technologies and policy developments. The Coalition’s ability to distill a complex and ever-evolving legislative landscape into clear, actionable insights has been invaluable. This membership has empowered John Crane to stay ahead of regulatory changes and engage more effectively in the energy transition”

Jessi Munsey, John Crane

In 2025 the Coalition:

Conducted a total of
103
congressional meetings

across
34
bipartisan state
delegations

with
73
individual offices
and committees

Policy Development & Convening Power

- January** Led effort of more than 160 organizations [calling on Congress](#) to maintain 45Q
- February** Published [2025 Federal Policy Blueprint](#)
- March** Hosted 3rd Annual Capitol Hill Day
- April** Submitted three [appropriations requests](#) to more than 60 congressional offices on key Coalition priorities
- May** Published [research brief](#) on the real value of the Section 45Q tax credit & made [public statements](#) on the cancellation of DOE-funded carbon capture projects
- June** Highlighted the critical role the EPA's [Greenhouse Gas Reporting Program](#) plays in the long-term success of the carbon management industry
 - Sent a [letter](#) to Congressional leadership underscoring the need for robust federal support for core R&D carbon management activities
- July** Secured a robust 45Q tax credit through the [passage of OBBBA](#)
- September** Articulated [post-OBBBA priorities](#) across permitting reform, regulations, and market demand
- October** Announced 2026 launch of an allied 501(c)(4), [Carbon Capture Impact](#)
- November** Filed consensus [comments](#) supporting the preservation of relevant carbon management subparts of the GHGRP and conducts extensive outreach to congressional champions on GHGRP
 - Hosted the 2025 Annual Meeting in California, with over 90 attendees, and includes a site visit to the Calpine Los Medanos Energy Demonstration Center
- December** Endorsed model interim guidance for the US Treasury to allow alternative quantification methods for secure geologic storage of carbon dioxide in the absence of the GHGRP

2025 POLICY BLUEPRINT RELEASE

The Coalition published its fourth-ever [Federal Policy Blueprint](#), a consensus-based road map developed by our diverse membership to guide action needed to enable economywide deployment of carbon management technologies. Building on months of work group discussions, it outlines common-sense policy, regulatory, and implementation recommendations to address inflationary pressures, improve project permitting, expand markets, and support next-generation technologies.

Communications

The Coalition's reach continues to grow, with Coalition staff and members being increasingly relied upon by members of the media for their expertise in carbon management technologies, policies, and politics.

The Coalition launched a [redesigned website](#), making our work more accessible to members, policymakers, and the public. This includes the "[Bite-sized Blueprint](#)" series which highlights key carbon management topics.

Featured in

140

media stories

across **90** outlets,
including The New York Times,
The Atlantic, POLITICO, and
The Financial Times

Hosted

3

media briefings

attracting **28**
members of the media

Released

31

Statement
and blogs

Impact Launching in 2026

The Coalition advanced a significant organizational milestone in 2025 with the announcement of the launch of [Carbon Capture Impact \(Impact\)](#), an affiliated 501(c)(4) organization that will formally begin operations in 2026. Impact will expand our collective ability to drive the shared policy agenda by enabling more flexible, targeted advocacy in support of nationwide carbon management deployment.

Beginning next year, Impact will assume leadership of the Legislative Work Group and engage directly with bipartisan Members of Congress and the administration to advance high-impact legislation. Built to amplify the voices of our broad and diverse network, Impact will provide members with an additional avenue to help shape and accelerate federal policy on carbon management. Impact will also launch a new [Advisory Council](#), designed to bring together senior leaders from impact organizations to discuss industry challenges, assess deployment opportunities, and provide strategic input on shared priorities.

Impact Dues

To ensure Impact has the resources necessary to sustain the Coalition’s long-standing advocacy activities, the Impact Board of Directors approved a new dues structure for trade associations and for-profit members beginning in 2026. Nonprofit and labor organizations of Impact will not be subject to dues, ensuring continued broad participation across the carbon management community. Dues paid to Impact will directly support targeted federal advocacy efforts, complementing the Coalition’s continued leadership in education, convenings, and communications. As a 501(c)(3) organization, the Carbon Capture Coalition will not charge dues to its members.

Together, these changes strengthen the foundation needed for both organizations to deliver on their shared mission and support the growing national momentum behind carbon management deployment.



The Path Forward

Looking forward, the Coalition and Impact will focus on the highest priority near-term steps that can unlock additional carbon management deployment in the next decade, including:

- Unlocking carbon management project deployment through smart changes to the current permitting regime
- Shore up and advance the necessary regulatory framework for carbon management
- Design market mechanisms to drive demand for carbon capture and direct air capture technologies
- Continue education across the political spectrum on the necessary role that these technologies play for our economy and environment

“The Carbon Capture Coalition has been an invaluable partner to ClearPath. By leveraging the expertise of a broad network of industry, labor, and NGO stakeholders, the Coalition continues to advance pragmatic carbon management policies that drive innovation, protect American jobs, and bolster US energy leadership.”

Kelsey Grant, ClearPath

Staff & Consultants

- **Jessie Stolark**, Executive Director
- **Madelyn Morrison**, Director of Government Affairs
- **Christian Flinn**, Public Policy Manager
- **Leo Duke**, Communications & Member Relations Specialist
- **Sangeet Nepal**, Technology Specialist
- **Ben Finzel**, Coalition Communications Consultant, RENEWPR
- **MJ Kenny**, Coalition Government Relations Consultant, KDCR Partners
- **Hunter Johnston**, Coalition Tax Consultant, Steptoe & Johnson LLP



Board Members

- **Laura Brannen**, The Nature Conservancy (Coalition Advisory Board President)
- **Barbara McBride**, Calpine (Coalition Advisory Board)
- **Jeremy Moddrell**, The United Association of Journeymen and Apprentices of the Plumbing and Pipefitting Industry (Coalition & Impact Boards)
- **Xan Fishman**, Bipartisan Policy Center (Coalition & Impact Boards)
- **Andrew Fishbein**, Climeworks (Coalition & Impact Boards)



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