

# **Global Ammonia Fuel Market Size Study and Forecast by Product (Green Ammonia, Blue Ammonia, Grey Ammonia), Application (Power Generation Fuel, Maritime Shipping Fuel, Industrial Process & Heat Fuel), Regional Forecasts 2026-2036**

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## **Abstracts**

The Global Ammonia Fuel Market, valued at USD 0.62 billion in 2025, is anticipated to reach USD 5.33 billion by 2036, growing at 21.60% CAGR during the forecast period. The ammonia fuel market has shifted from a conventional decarbonization notion to an industrial commercialization story. Heavy industries are now considering ammonia as a practical low-carbon energy carrier, not as a laboratory-scale alternative fuel. This transition is majorly accelerated by the shipping industry. Vessel operators turned to ammonia powered engines to cope with more stringent rules on maritime emissions. Power generators increased pilot deployment activities at coal co-firing plants, gas turbines, utility-scale storage projects, and seasonal hydrogen transport infrastructure. Governments in Asia Pacific, Europe and North America expanded funding allocations for hydrogen produced fuels. Investment momentum spread swiftly throughout export driven economies endowed with ample renewable electricity supplies. Countries such as Australia, Saudi Arabia, India and Chile have unveiled large scale green ammonia manufacturing projects. Industrial buyers are now prioritising lifetime emission profiles, supply chain reliability and energy security considerations while evaluating fuel procurement strategies. This trend is further changing global ammonia trade flows, investment objectives for infrastructure and long-term energy transition frameworks.

Ammonia fuel is ammonia used as a energy carrier or as a combustion fuel across applications such as transportation, industrial heating and power generation. The market consists of green ammonia produced from the electrolysis powered by renewable electricity, blue ammonia produced from natural gas with carbon capture

systems and grey ammonia produced from conventional fossil fuel pathways. Market participants are active in production, storage, transport, bunkering, engine manufacturing, fuel conversion technologies and downstream energy applications. Due to its high hydrogen density and existing global handling infrastructure, ammonia has a number of commercial advantages for long distance energy transport. There is a great deal of interest in the fuel from hard-to-abate sectors where direct electrification is not commercially viable. Ammonia is increasingly being recognised by regulatory institutions within net zero transition frameworks for its carbon free combustion potential. However, the adoption will depend on the cost competitiveness, infrastructure readiness, toxicity management systems and large scale renewable hydrogen availability. Therefore the market plays a strategic role in the wider low carbon fuels ecosystem.

## Research Scope and Methodology

The report provides an analysis of the global ammonia fuel market by product category, application, regional demand, technological evolution, regulatory landscape, and competition. The scope includes applications across production technologies, maritime fuels, power generation, industrial heating, trends in infrastructure development and supply chain integration. Ecosystem participants include ammonia producers, electrolyser manufacturers, renewable energy developers, shipping companies, turbine manufacturers, storage infrastructure operators and government agencies. The analysis focuses on commercial scalability, policy support mechanisms, investment flows and long-term market positioning in developed and emerging economies.

The research methodology comprises primary interviews, secondary research, and analytical triangulation. Analysts engaged with technology providers, fuel producers, maritime operators, infrastructure developers, regulatory stakeholders and procurement executives. Secondary research is based on the data from government publications, industry associations, annual reports, technical journals, trade databases and sustainability disclosures. Other industry sources used for secondary research include the International Energy Agency (IEA), International Maritime Organisation (IMO), International Renewable Energy Agency (IRENA), U.S. Energy Information Administration (EIA), Ammonia Energy Association (AEA), International Fertiliser Association (IFA), Hydrogen Council, DNV, Lloyd's Register, and ICIS. The study also covered policy analysis on carbon pricing systems, maritime decarbonization mandates, renewable energy targets and industrial emission reduction programs. Market estimation models included production economics, infrastructure investment requirements, regional demand patterns and time to adoption. Forecast models

included trends in renewable electricity prices, electrolyser deployment rates, carbon capture adoption and expansion of ammonia trade corridors. The approach favours commercially validated developments over speculative technology assumptions.

## Key Market Segments

### By Product:

Green Ammonia

Blue Ammonia

Grey Ammonia

### By Application:

Power Generation Fuel

Maritime Shipping Fuel

Industrial Process & Heat Fuel

## Industry Trends

Markets will favour certification for low carbon over general supply promises. Purchasers will seek out emission-intensity tracking data from regulatory agencies, financiers and consumers demanding verifiable information for decarbonization. Producers without certified systems will find themselves at a disadvantage when negotiating premium deals.

Maritime transport is the clear leader in creating demand drivers. Orders for dual-fuel ships provide a reason for building terminals and entering into long-term supply deals. Engine manufacturers are rapidly speeding up the development of engines that can run on ammonia, pushing forward the adoption period for certain classes of ships.

As global energy security interests converge, the commercialisation of ammonia as fuel gathers pace. Import-dependent nations are seeking to diversify their procurement

approaches through renewables ammonia alliances. Governments are promoting bilateral supply deals to ensure long-term fuel supplies. This is changing the dynamics of international energy trade.

Maritime decarbonization remains the strongest catalyst for ammonia fuel adoption. The International Maritime Organization tightened carbon intensity requirements for global shipping fleets. Shipowners therefore accelerated investments in alternative fuel capable vessels. Engine manufacturers have increased their ammonia compatible engine development programs to meet the needs of future fleet, while port operators are evaluating deployment of ammonia bunkering infrastructure.

Green ammonia projects are becoming more and more vertically integrated across renewable electricity generation, hydrogen production, ammonia synthesis, storage, and export logistics. Developers pursue integrated project structures to improve operational economics and reduce supply chain volatility. Large-scale projects now emerge near low cost solar and wind resource zones.

Industrial clusters increasingly evaluate ammonia as a replacement for fossil based thermal fuels. Steel, cement, refining, and chemical sectors seek low emission heating solutions to comply with tightening environmental regulations. According to 2024 reports of the International Renewable Energy Agency (IRENA), industrial decarbonization remains a major investment priority across advanced economies.

Power utilities continue to explore ammonia co-firing within coal power plants. Several Asian utilities launched demonstration projects to reduce carbon emissions from existing thermal generation assets. This enables a more gradual decarbonization process without requiring immediate retirement of installed infrastructure.

Carbon accounting standards are also beginning to play a more significant role in procurement strategies. Industrial buyers are now looking at lifecycle emissions rather than just direct combustion emissions. This trend is positive for green ammonia producers but increases the pressure on blue ammonia carbon capture performance metrics.

Technology providers are continuing to improve ammonia cracking systems, storage technologies, combustion efficiency, and safety protocols. Advanced catalyst development programs seek higher energy conversion efficiency and lower operational costs. Innovation within storage materials also supports broader infrastructure scalability.

Investment structures increasingly involve sovereign wealth funds, infrastructure investors, utilities, and commodity trading companies. Investors recognise ammonia fuel as both an energy transition asset and a strategic export opportunity. Capital deployment, therefore, accelerated across production hubs linked to future export corridors.

Supply chain localisation strategies also shape market evolution. Governments seek domestic ammonia production capabilities to reduce exposure to geopolitical energy disruptions. National hydrogen roadmaps, therefore, increasingly include ammonia import-export infrastructure planning.

The market also witnesses growing convergence between hydrogen strategies and ammonia commercialisation frameworks. Ammonia is increasingly functioning as a hydrogen transport mechanism in international energy trade. This convergence strengthens long-term infrastructure investment rationale across the value chain.

By 2036, ammonia fuels may compete not just on decarbonization merits but also on energy security and fuel diversity advantages. These additional attributes could substantially broaden the target market.

### Key Findings of the Report

Market Size 2025: USD 0.62 billion

Estimated Market Size 2036: USD 5.33 billion

CAGR 2026 to 2036: 21.60%

Leading Regional Market: Asia Pacific

Fastest Growing Regional Market: Europe

Leading Segment: Maritime Shipping Fuel

High Momentum Product Segment: Green Ammonia

### Market Determinants

## Expansion of Maritime Decarbonization Regulations

Shipping companies face mounting pressure to reduce fleet emissions. International maritime regulations increasingly penalize carbon intensive fuels. Ammonia, therefore, emerged as a commercially relevant alternative for long-distance shipping operations. Vessel procurement decisions now increasingly incorporate ammonia compatibility considerations.

## Renewable Hydrogen Production Growth

Renewable electricity deployment directly influences green ammonia economics. Declining solar and wind generation costs improve long-term competitiveness for renewable hydrogen-derived ammonia production. The availability of renewable energy on a large scale, therefore, acts as a foundational market enabler.

## Infrastructure Readiness Constraints

Ammonia fuel deployment requires specialised storage, transport, bunkering, and safety infrastructure. Integrated ammonia fuel ecosystems are still missing in many regions. While policy support and investment interest are increasing, infrastructure constraints are limiting commercial scale-up.

## Carbon pricing and emission reduction policies

Governments are increasingly implementing carbon taxes and industrial emission requirements that improve the relative competitiveness of low-carbon fuels, leading to faster ammonia adoption in sectors facing tighter environmental compliance requirements.

## Safety and Toxicity Concerns

Due to the toxicity risks, safety standards for ammonia handling are rigorous and public acceptance, workforce training, emergency response systems and operation protocols are key adoption factors. Safety-related investment requirements may increase operational costs across early-stage deployments.

## Volatility in Natural Gas Economics

The economics of producing blue ammonia and grey ammonia are still very sensitive to the volatility of natural gas prices. Feedstock volatility impacts production costs, export competitiveness, and long-term project viability. Producers, therefore, increasingly diversify toward renewable pathways.

### Opportunity Mapping Based on Market Trends

#### Export-Oriented Green Ammonia Hubs

Countries with abundant renewable resources can establish large-scale ammonia export economies. Australia, Middle-East nations and Latin American economies increasingly position themselves as future low-carbon fuel exporters.

#### Ammonia Bunkering Infrastructure Development

Ports investing early in ammonia storage and bunkering infrastructure may realise strategic competitive advantages. Maritime fuel transition drives significant infrastructure investment opportunities along logistics corridors.

#### Industrial Decarbonization Partnerships

Industrial clusters increasingly seek long-term fuel supply partnerships to mitigate emissions exposure. Ammonia manufacturers can secure stable revenue streams through integrated industrial decarbonization agreements.

#### Integrated Hydrogen Ammonia Value Chains

Companies able to integrate hydrogen production, ammonia synthesis, storage and downstream applications may realize stronger margin resilience and operational efficiency. Vertical integration thus represents a major strategic opportunity.

#### Value-Creating Segments and Growth Pockets

#### By Product

The market is segmented into Green Ammonia, Blue Ammonia, and Grey Ammonia.

Currently, Green Ammonia dominates the global ammonia fuel market with an estimated 48.6% market share in 2025. Strong policy backing for renewable hydrogen

projects, rising carbon reduction commitments, and growing investments in export-oriented production hubs continue supporting segment leadership. Governments across Japan, South Korea, Australia, Saudi Arabia, and the European Union are increasingly prioritising green ammonia in their respective national hydrogen roadmaps. Green ammonia is also preferred by industrial consumers because of its almost-zero lifecycle emissions, with the integration of large-scale renewable energy sources underpinning the scalability of production across large economies. Shipping companies are constantly evaluating green ammonia for procurement to meet their long-term decarbonisation ambitions in the maritime sector.

Blue Ammonia is expected to witness the highest CAGR of 24.8% during 2026-2036.

The segment benefits from comparatively lower transition costs compared to other segments and the availability of existing natural gas infrastructure. Carbon capture integration allows producers to reduce emissions without fully depending on renewable electricity scalability. Several energy exporting countries continue investing aggressively in blue ammonia as an intermediate decarbonization pathway. The segment also attracts industrial buyers seeking commercially viable low carbon fuel alternatives during early market transition stages.

### By Application

The market is segmented into Power Generation Fuel, Maritime Shipping Fuel, and Industrial Process & Heat Fuel.

Currently, Maritime Shipping Fuel accounts for the highest market share with an estimated 44.2% share in 2025. International shipping companies continue facing mounting regulatory pressure to reduce greenhouse gas emissions across long distance marine transportation networks. Ammonia emerged as a commercially relevant fuel option due to its carbon free combustion potential and suitability for deep sea shipping operations. Engine manufacturers accelerated ammonia compatible engine development, while major ports initiated bunkering infrastructure planning activities. The 2024 reports of the International Maritime Organization (IMO) show that shipping decarbonization is still a key aspect of global maritime regulatory frameworks.

Industrial Process & Heat Fuel is forecast to expand at the highest rate during the forecast period, with an estimated CAGR of 23.1% during 2026–2036. Heavy industries are increasingly seeking alternatives to fossil-based thermal fuels to comply with stringent environmental regulations and corporate sustainability commitments. Sectors

including steel, cement, refineries, chemicals, and fertilizers are continuing to evaluate ammonia-based heating systems to power high-temperature industrial processes. Increasing carbon pricing mechanisms and industrial decarbonization mandates further strengthen the long-term growth potential of the segment.

## Regional Market Assessment

### North America

North America has a mature ammonia production infrastructure, advanced carbon capture technologies, and rising investment in hydrogen projects. The U.S. remains committed to clean hydrogen initiatives through policy incentives and industrial funding programs. Energy security goals also drive diversification of fuel sources. Major port decarbonization efforts are leading to ammonia infrastructure planning. Industrial decarbonization commitments from the refining, chemicals, and heavy manufacturing sectors support long-term market demand.

### Europe

Europe is demonstrating robust regulatory momentum towards low-carbon fuel adoption. Carbon pricing schemes and emission reduction mandates are propelling industrial transition strategies. The European Union is proactively enabling hydrogen and ammonia import partnerships to strengthen regional energy security. Maritime decarbonization policies are further fuelling ammonia bunkering infrastructure development across key ports. Industrial companies are progressively assessing ammonia fuel integration to meet environmental regulations and sustainability goals.

### Asia Pacific

The Asia Pacific region is the largest strategic market for ammonia fuel deployment. Japan and South Korea are aggressively working on ammonia co-firing projects to decarbonise existing thermal power assets. China continues to expand its renewable energy capacity and hydrogen infrastructure investments. According to 2024 reports from the International Energy Agency (IEA), the Asia Pacific region remains a dominant energy consumption region globally. Strong shipping activity and industrial demand further reinforce regional market leadership.

### LAMEA

LAMEA is increasingly emerging as a major ammonia export production region due to abundant renewable energy resources and strategic trade positioning. Middle Eastern economies are actively diversifying beyond conventional hydrocarbons through green ammonia investments. Latin American countries also pursue export-oriented renewable fuel strategies. Africa offers long-term renewable generation potential for future ammonia production hubs. Infrastructure limitations remain a challenge across several regional markets.

## North America

North America benefits from established ammonia production infrastructure, advanced carbon capture capabilities, and expanding hydrogen investment programs. The United States continues to support clean hydrogen initiatives through policy incentives and industrial funding mechanisms. Energy security priorities also encourage alternative fuel diversification strategies. Shipping decarbonization activities across major ports increasingly support ammonia infrastructure planning. Industrial decarbonization commitments across refining, chemicals, and heavy manufacturing sectors strengthen long-term market demand.

## Europe

Europe maintains strong regulatory momentum supporting low-carbon fuel adoption. Carbon pricing systems and emission reduction mandates accelerate industrial transition strategies. The European Union actively supports hydrogen and ammonia import partnerships to strengthen regional energy security. Maritime decarbonization policies also stimulate ammonia bunkering infrastructure development across major ports. Industrial companies increasingly evaluate ammonia fuel integration to comply with environmental regulations and sustainability targets.

## Asia Pacific

Asia Pacific represents the largest strategic market for ammonia fuel deployment. Japan and South Korea aggressively pursue ammonia co-firing projects to decarbonise existing thermal power assets. China continues expanding renewable energy capacity and hydrogen infrastructure investments. According to 2024 reports of the International Energy Agency (IEA), Asia Pacific region remains a dominant energy consumption region globally. Strong shipping activity and industrial demand further reinforce regional market leadership.

## LAMEA

LAMEA increasingly emerges as a major ammonia export production region due to abundant renewable energy resources and strategic trade positioning. Middle Eastern economies actively diversify beyond conventional hydrocarbons through green ammonia investments. Latin American countries also pursue export-oriented renewable fuel strategies. Africa offers long-term renewable generation potential for future ammonia production hubs. Infrastructure limitations remain a challenge across several regional markets.

## Recent Developments

April 2025: CF Industries announced a joint venture with JERA Co., Inc. and Mitsui & Co. to develop a large-scale low-carbon ammonia production facility in Louisiana. The project is expected to bolster global ammonia supply chains for power generation and maritime fuel applications while accelerating the commercialisation of carbon captured ammonia production pathways.

August 2025: Air Products announced a partnership with Yara International to bring low-carbon hydrogen into ammonia production operations at the Louisiana Clean Energy Complex. The partnership supports the expansion of cleaner ammonia production capacity and reflects the increasing demand from industry for low-emission fuel alternatives in global export markets.

June 2025: Yara Clean Ammonia supported a large-scale ammonia bunkering pilot project to accelerate the deployment of ammonia as a maritime fuel. The initiative supports operational readiness for ammonia-fuelled shipping infrastructure and builds commercial confidence in ammonia as a viable marine fuel for long-distance transportation networks.

## Critical Business Questions Addressed

What is the long-term commercial outlook for the ammonia fuel market?

The report evaluates market scalability, investment momentum, regulatory support structures, and adoption timelines across key industries and regional markets.

Which application segment offers the strongest growth potential?

The analysis compares maritime shipping, industrial heating, and power generation adoption dynamics to identify commercially attractive investment opportunities.

How will green ammonia compete against blue and grey ammonia pathways?

The study evaluates lifecycle emissions, production economics, infrastructure readiness, and policy support influencing product level competitiveness.

Which regional markets are expected to dominate future demand?

The report assesses regional policy frameworks, industrial demand patterns, export capabilities, and infrastructure development activities shaping future market leadership.

What strategic risks may impact market scalability?

The analysis identifies infrastructure constraints, feedstock economics, safety considerations, regulatory uncertainty, and technology readiness challenges affecting commercial deployment.

### Beyond the Forecast

Ammonia fuel markets will increasingly evolve alongside global hydrogen trade systems rather than operate as standalone energy segments. Infrastructure integration, therefore, becomes strategically critical.

Market leadership will be less about production capacity alone. Supply chain integration, access to renewable electricity, logistics positioning and regulatory alignment will be the determinants of competitive advantage.

Industrial decarbonization pressures continue to strengthen the long-term relevance of ammonia fuel across sectors where electrification remains commercially constrained.

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