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Global Ammonia Recovery Unit (ARU) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Ammonia Recovery Unit (ARU) market size is expected to reach $ 1928 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

Ammonia Recovery Unit (ARU) refers to an integrated industrial system designed to separate, concentrate and recover ammonia or ammoniacal nitrogen from industrial wastewater, process off-gas, coke oven gas, refinery sour water, anaerobic digestate and ammonia refrigeration systems. A typical unit comprises feed conditioning and pH adjustment equipment, steam or air stripping columns, distillation or regeneration sections, membrane contactors where applicable, absorption towers, condensers, heat exchangers, circulation pumps, compressors, storage vessels, instrumentation and automated controls. Depending on the feed composition and selected process, recovered products include anhydrous ammonia, concentrated aqueous ammonia, ammonium sulfate, ammonium nitrate and other reusable ammonium salts. Key performance indicators include feed ammonia concentration, treatment capacity, ammonia recovery efficiency, recovered-product concentration, residual ammonia level, steam and electricity consumption, acid or alkali consumption, fouling resistance and operating stability.

Key Findings

Global shipments reached approximately 2,300 ammonia recovery units and system packages in 2025

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Steam stripping and distillation represented the largest technology segment

Chemical manufacturing was the largest downstream market by revenue

Asia Pacific led installations while Europe remained active in nutrient recovery technologies

Market Trends

The Ammonia Recovery Unit industry is moving from compliance-oriented ammonia removal toward resource-recovery platforms that convert nitrogen-bearing waste streams into reusable chemical products. Steam stripping and distillation remain the principal technologies for high-concentration industrial wastewater, sour water and coke-oven applications, but suppliers are improving heat integration through mechanical vapor recompression, heat pumps, feed-effluent exchangers and closed-loop steam recycling. Air stripping combined with acid absorption is expanding in digestate, battery-material wastewater and medium-concentration industrial streams because it can produce ammonium sulfate or ammonium nitrate fertilizer solutions. Membrane stripping is progressing from pilot and demonstration projects toward commercial deployment, supported by lower operating temperatures, modular construction and reduced dependence on large stripping towers. Product development is also focused on anti-scaling internals, corrosion-resistant materials, automated pH control, online ammonia measurement, variable-load operation and skid-mounted construction. Customers increasingly require guaranteed recovered-product quality rather than ammonia removal alone, encouraging closer integration of stripping, absorption, concentration, crystallization and product-storage equipment. Longer-term competition will center on energy consumption per kilogram of ammonia recovered, resistance to complex contaminants, system availability, product purity and the ability to achieve commercially viable nitrogen recovery at progressively lower feed concentrations.

Market Dynamics

Drivers

Demand is driven by tightening ammonia-nitrogen discharge limits, rising wastewater-treatment costs and growing pressure on industrial facilities to reduce nitrogen emissions. Chemical plants, refineries, coke producers, metal processors, semiconductor manufacturers and battery-material plants generate concentrated

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ammonia-bearing streams that can be difficult or expensive to treat biologically. Recovering ammonia before downstream biological treatment reduces nitrogen loading, aeration demand and chemical consumption while producing ammonia water or ammonium salts that can be reused internally or sold. Expansion of lithium-ion battery materials, semiconductor fabrication, biogas production and industrial wastewater recycling is creating additional concentrated side streams suitable for recovery. High ammonia and fertilizer prices also improve the economics of converting waste nitrogen into a marketable product.

Restraints

The main restraint is the high capital cost of customized columns, heat exchangers, absorption equipment, corrosion-resistant materials, controls and associated civil works. Thermal stripping can consume substantial steam when feed concentrations are low or heat integration is limited, while air stripping may require significant alkali and acid consumption. Feed streams containing suspended solids, hardness, silica, oils, heavy metals or organic compounds can cause scaling, foaming, membrane wetting, corrosion and contamination of the recovered product. Project economics depend strongly on ammonia concentration, flow stability, local energy prices and the ability to reuse or sell the output. Smaller plants may therefore continue using biological nitrogen removal or outsourced wastewater treatment instead of investing in dedicated recovery equipment.

Opportunities

The strongest opportunities are emerging in modular heat-integrated systems, membrane contactors, nutrient recovery from digestate and ammonia recycling in battery and semiconductor manufacturing. Suppliers can expand by offering standardized skid-mounted units for medium-capacity users that lack the scale or engineering resources required for fully customized plants. Integrating ammonia recovery with evaporation, crystallization, zero-liquid-discharge systems and renewable fertilizer production can improve both environmental performance and project returns. Retrofitting existing steam-stripping plants with vapor recompression, heat pumps and advanced controls offers another substantial opportunity. Service-based business models covering pilot testing, system leasing, performance guarantees, remote monitoring and recovered-product offtake could lower adoption barriers for customers with uncertain feed composition or limited capital budgets.

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Challenges

A major industry challenge is maintaining stable recovery efficiency and product quality under variable feed conditions. Ammonia equilibrium is highly sensitive to pH and temperature, while complex industrial wastewaters may change rapidly in flow, salt concentration and contaminant composition. Recovered ammonium salts must meet customer or fertilizer-quality requirements, and trace metals or organic impurities can restrict reuse. Large systems require careful management of ammonia toxicity, odor, corrosion and explosion risks, as well as dependable containment and emergency controls. Technology providers must also demonstrate that energy use and chemical consumption remain economically justified throughout the equipment life cycle. Lengthy customer validation, site-specific engineering, permitting requirements and limited operating references for newer membrane systems can further extend project-development timelines.

Industry Chain Analysis

The upstream of the Ammonia Recovery Unit industry includes stainless steel and specialty-alloy equipment, engineered plastics, structured and random packing, membranes, compressors, pumps, blowers, heat exchangers, condensers, evaporators, crystallizers, valves, instrumentation, pH and ammonia sensors, control systems, acids, alkalis and thermal-energy equipment. Midstream participants undertake feed characterization, process selection, mass-transfer design, column and membrane engineering, heat integration, skid fabrication, automation, installation, commissioning and lifecycle service. Downstream users include oil and gas refiners, coke and steel producers, chemical manufacturers, semiconductor and battery-material plants, mining and metallurgical companies, biogas and fertilizer facilities, food and cold-chain operators and municipal wastewater-treatment plants. Value creation is concentrated in selecting the correct recovery route for each feed, minimizing steam and reagent consumption, maintaining reliable operation under scaling and corrosion conditions, and delivering a recovered product with stable concentration and marketable quality.

Segment Insights

Steam stripping and distillation account for the largest share of current market revenue because these technologies are well established in refinery sour-water treatment, coke-oven gas processing and high-concentration chemical wastewater applications. They are particularly suitable when customers require concentrated ammonia water,

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ammonia gas or liquid ammonia and when sufficient steam and heat-integration infrastructure are available. Air stripping and acid absorption represent an important second segment and are widely applicable where ammonia can be recovered directly as ammonium sulfate or ammonium nitrate. Their relatively straightforward process configuration supports use in digestate, metals processing and battery-material wastewater, although reagent consumption and final salt quality require careful control.

Membrane stripping is a smaller but faster-developing segment. Hydrophobic membrane contactors provide a large gas-transfer area in compact equipment and can recover ammonia without high-pressure filtration. The technology is attractive for modular installations, variable flows and heat-sensitive streams, but long-term membrane wetting, fouling, chemical resistance and replacement cost remain important commercialization factors. Hybrid systems combining thermal stripping, membranes, acid absorption, evaporation or crystallization are gaining attention where customers require high overall recovery and a concentrated or solid ammonium-salt product.

Downstream Market Opportunities

Chemical manufacturing currently represents the largest value-oriented application because ammonia appears in a wide range of reaction, separation and wastewater streams and can often be returned to production. Coke and steel plants remain important users of large centralized systems for recovering ammonia from coke-oven gas and ammoniacal liquor, while refineries use sour-water stripping and downstream ammonia handling. Semiconductor and lithium-ion battery-material manufacturing provide strong incremental opportunities because their production expansions generate regulated ammonia-bearing wastewater with relatively high recovery value. Mining, non-ferrous metallurgy, anaerobic digestion and fertilizer production offer additional demand for ammonium sulfate recovery. Ammonia refrigeration facilities form a distinct equipment segment centered on safe removal, liquefaction, storage and recharging of refrigerant during maintenance and system modification.

Regional Insights

Asia Pacific represents the largest installation market, supported by its concentration of chemical, steel, coke, semiconductor, battery-material and metallurgical production. China is particularly important in large industrial wastewater projects and localized equipment manufacturing, while Japan has a strong base of specialized process-engineering companies serving chemical, electronics and high-value wastewater

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applications. South Korea and Taiwan provide additional demand from semiconductor, display and battery supply chains. Regional competition combines established engineering groups with local specialists capable of adapting systems to complex feed conditions and cost-sensitive projects.

Europe is an important market for nutrient recovery from municipal sidestreams, anaerobic digestate and biogas facilities, supported by circular-economy policies and interest in domestic fertilizer resources. North American demand is concentrated in refining, chemicals, food processing, industrial refrigeration and environmental retrofits, with customers placing strong emphasis on safety, automation and lifecycle service. The Middle East offers opportunities in refining, petrochemicals, fertilizers and large industrial water projects, while adoption in Latin America and other emerging regions depends more heavily on project financing, technical-service availability and the local value of recovered ammonium products.

Competitive Landscape Analysis

The competitive landscape is fragmented because Ammonia Recovery Units cover several distinct process environments and are generally engineered for individual projects. thyssenkrupp Uhde and KBR have strong positions in large coke-oven and process-industry ammonia recovery technologies, while Koch-Glitsch contributes mass-transfer and separation engineering capabilities. Sasakura Engineering, Mitsubishi Chemical Engineering, DJ-WAVE Engineering, Miura Chemical Equipment and OES represent Japan’s specialized process-equipment base. Berg Chilling Systems focuses on purpose-built ammonia recovery equipment for industrial refrigeration. Byosis and NPHarvest are developing modular nitrogen-recovery approaches for digestate and wastewater, while Envitech supplies customized gas-phase ammonia recovery systems. In China, Beijing Zhongke Guorun, Jinan Zhongchang Complete Equipment and Sichuan Kaiyuan Technology address industrial wastewater, ammonium-salt recovery and off-gas applications. Competition is determined less by standardized equipment pricing than by recovery guarantees, energy consumption, contaminant tolerance, engineering references, recovered-product quality, commissioning capability and long-term technical support.

Report Scope

This report studies the global Ammonia Recovery Unit (ARU) production, demand, key

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manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Ammonia Recovery Unit (ARU) and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Ammonia Recovery Unit (ARU) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Ammonia Recovery Unit (ARU) total production and demand, 2021-2032, (Units)

Global Ammonia Recovery Unit (ARU) total production value, 2021-2032, (USD Million)

Global Ammonia Recovery Unit (ARU) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Ammonia Recovery Unit (ARU) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Ammonia Recovery Unit (ARU) domestic production, consumption, key domestic manufacturers and share

Global Ammonia Recovery Unit (ARU) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Ammonia Recovery Unit (ARU) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Ammonia Recovery Unit (ARU) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Ammonia Recovery Unit (ARU) market based on the following parameters - company overview, production, value, price, gross

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margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include thyssenkrupp Uhde GmbH, KBR, Inc., Koch-Glitsch, Sasakura Engineering Co., Ltd., Mitsubishi Chemical Engineering Corporation, Berg Chilling Systems Inc., Byosis Group B.V., NPHarvest Oy, Envitech, Inc., DJ-WAVE Engineering Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Ammonia Recovery Unit (ARU) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (K US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Ammonia Recovery Unit (ARU) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Ammonia Recovery Unit (ARU) Market, Segmentation by Type:

Steam Stripping and Distillation

Air Stripping and Acid Absorption

Membrane Stripping

Others

Global Ammonia Recovery Unit (ARU) Market, Segmentation by Feed Stream:

Ammonia-containing Wastewater

Ammonia-containing Off-gas

Others

Global Ammonia Recovery Unit (ARU) Market, Segmentation by Recovered Product:

Anhydrous Ammonia

Aqueous Ammonia

Ammonium Sulfate

Ammonium Nitrate

Other Ammonium Salts

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Others

Global Ammonia Recovery Unit (ARU) Market, Segmentation by Application:

Oil and Gas

Coke and Steel

Chemical

Semiconductor

Battery Material

Mining and Metallurgy

Others

Companies Profiled:

thyssenkrupp Uhde GmbH

KBR, Inc.

Koch-Glitsch

Sasakura Engineering Co., Ltd.

Mitsubishi Chemical Engineering Corporation

Berg Chilling Systems Inc.

Byosis Group B.V.

NPHarvest Oy

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Envitech, Inc.

DJ-WAVE Engineering Co., Ltd.

Miura Chemical Equipment Co., Ltd.

OES Co., Ltd.

Beijing Zhongke Guorun

Jinan Zhongchang Complete Equipment

Sichuan Kaiyuan Technology

Key Questions Answered

1. How big is the global Ammonia Recovery Unit (ARU) market?
2. What is the demand of the global Ammonia Recovery Unit (ARU) market?
3. What is the year over year growth of the global Ammonia Recovery Unit (ARU) market?
4. What is the total value of the global Ammonia Recovery Unit (ARU) market?
5. Who are the Major Players in the global Ammonia Recovery Unit (ARU) market?
6. What are the growth factors driving the market demand?

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