

Global Marine Urea Solution Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Marine Urea Solution market size is expected to reach \$ 732 million by 2032, rising at a market growth of 3.9% CAGR during the forecast period (2026-2032).

By 2024, global Marine Urea Solution production is expected to reach 1,196,000 tons, with an average selling price of US\$437 per ton. The industry average gross profit margin is approximately 34%.

Marine urea solution is a high-purity urea aqueous solution specifically designed for marine selective catalytic reduction (SCR) systems. Its main components are high-purity urea and deionized water. Its function is to reduce nitrogen oxides (NOx) emitted from marine diesel engines into harmless nitrogen (N₂) and water, thereby meeting emission standards set by the International Maritime Organization (IMO) (such as IMO Tier III standards).

The upstream of the industry chain mainly consists of high-purity urea (prill/granular urea, etc., from urea producers/traders) + deionized/EDI water, as well as packaging and cross-port logistics resources such as IBC/ISO TANK/tank trucks; the midstream involves the allocation and filling, batch testing and traceability system around ports or in the region (ensuring compliance with ISO impurity limits and concentration requirements), and delivery of products to 'port tank farms/ships' through storage tank farms and ship supply operations; the downstream mainly targets the operation and management companies of newly built or converted ships (merchant ships, ro-ro passenger ships, inland waterway vessels, etc.) equipped with SCR, with demand increasing with the scope and implementation of IMO Tier III in NOx ECA/NECA regions, and usage is strongly correlated with operating conditions.

The global marine urea supply chain begins with large chemical companies (such as Yara and CF Industries) and manufacturers relying on fertilizer bases (especially in China), with their synthetic ammonia and urea production capabilities as the core. The products are delivered to dedicated storage tanks in major port hubs around the world

by road, rail and coastal shipping. Finally, they are sold to passing ships by port filling stations, fuel suppliers or traders in the form of barrels or bonded warehouse barges. Its circulation is highly dependent on shipping routes, environmental regulations (such as the IMO sulfur limit/nitrogen oxide emission control area) and port infrastructure layout.

Factors influencing the demand for marine urea solutions include the growth of the maritime transportation industry, stricter emission norms, government initiatives promoting sustainable shipping practices, and rising awareness about environmental protection. Additionally, the development of advanced SCR technologies and the expansion of infrastructure for the production, storage, and distribution of marine urea solutions also contribute to the market growth.

The current market situation is characterized by 'standardized products + servitized delivery': the products themselves are relatively homogeneous, but price and competitiveness depend more on port coverage, delivery mode (bulk/IBC), quality and liability terms, and ship-to-ship supply capabilities. Future trends include NECA driving continued demand expansion, the supply chain shifting from 'single-point supply' to 'port networking and integrated warehousing and distribution,' and the emergence of more on-site or onboard AUS40 preparation or blending solutions for cost reduction and efficiency improvement (such as Urea Generator's approach of on-site AUS40 preparation according to ISO standards).

This report studies the global Marine Urea Solution production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Marine Urea Solution 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 Marine Urea Solution that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Marine Urea Solution total production and demand, 2021-2032, (K Tons)

Global Marine Urea Solution total production value, 2021-2032, (USD Million)

Global Marine Urea Solution production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Tons), (based on production site)

Global Marine Urea Solution consumption by region & country, CAGR, 2021-2032 & (K Tons)

U.S. VS China: Marine Urea Solution domestic production, consumption, key domestic manufacturers and share

Global Marine Urea Solution production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Tons)

Global Marine Urea Solution production by Type, production, value, CAGR, 2021-2032,

(USD Million) & (K Tons)

Global Marine Urea Solution production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Tons)

This report profiles key players in the global Marine Urea Solution market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Yara, CF Industries, GreenChem, Prasinus Holdings(ECOUREA), Fluechem, ZHEJIANG ZLINSE ENVIRONMENTAL PROTECTION TECHNOLOGY, TECO Chemicals AS, New Blue, Guangzhou Lanhesu Environmental Protection Technology Co., Ltd., NOVAX Material, 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 Marine Urea Solution market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Tons) and average price (US\$/Ton) 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 Marine Urea Solution Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Marine Urea Solution Market, Segmentation by Type:

?40%

40%

?40%

Global Marine Urea Solution Market, Segmentation by Application:

Container Ships

Bulk Carriers

Others

Companies Profiled:

Yara

CF Industries

GreenChem

Prasinus Holdings(ECOUREA)

Fluechem

ZHEJIANG ZLINSE ENVIRONMENTAL PROTECTION TECHNOLOGY

TECO Chemicals AS

New Blue

Guangzhou Lanhesu Environmental Protection Technology Co., Ltd.

NOVAX Material

Blutec Chemicals

Sichuan Meifeng

Innoco Oil Pte Ltd

Prosperco

Nantong Chuanglan Environmental Protection Technology Co., Ltd.

XinLianXin

Key Questions Answered:

1. How big is the global Marine Urea Solution market?
2. What is the demand of the global Marine Urea Solution market?
3. What is the year over year growth of the global Marine Urea Solution market?
4. What is the production and production value of the global Marine Urea Solution market?
5. Who are the key producers in the global Marine Urea Solution market?
6. What are the growth factors driving the market demand?

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