



AMMONIA ENERGY
ASSOCIATION

Low-emission Ammonia Production and Utilization in Europe

Green Ammonia Energy Workshop (Eindhoven, NL)

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Ammonia Energy Association

April 1st 2026

Ammonia Energy Association



Clean ammonia energizes the future

Who we are

The **Ammonia Energy Association** (AEA) is a global industry association that promotes the responsible use of ammonia in a sustainable energy economy.

Members: 250+
global and cross-sectoral

Our mission

Accelerate the responsible adoption of clean ammonia by promoting cross-sectoral collaboration, knowledge sharing, global standards, and supportive policies.

Strategic pillars

Knowledge stewardship,
Program development,
Collaboration,
Advocacy

AEA Members: November 2025

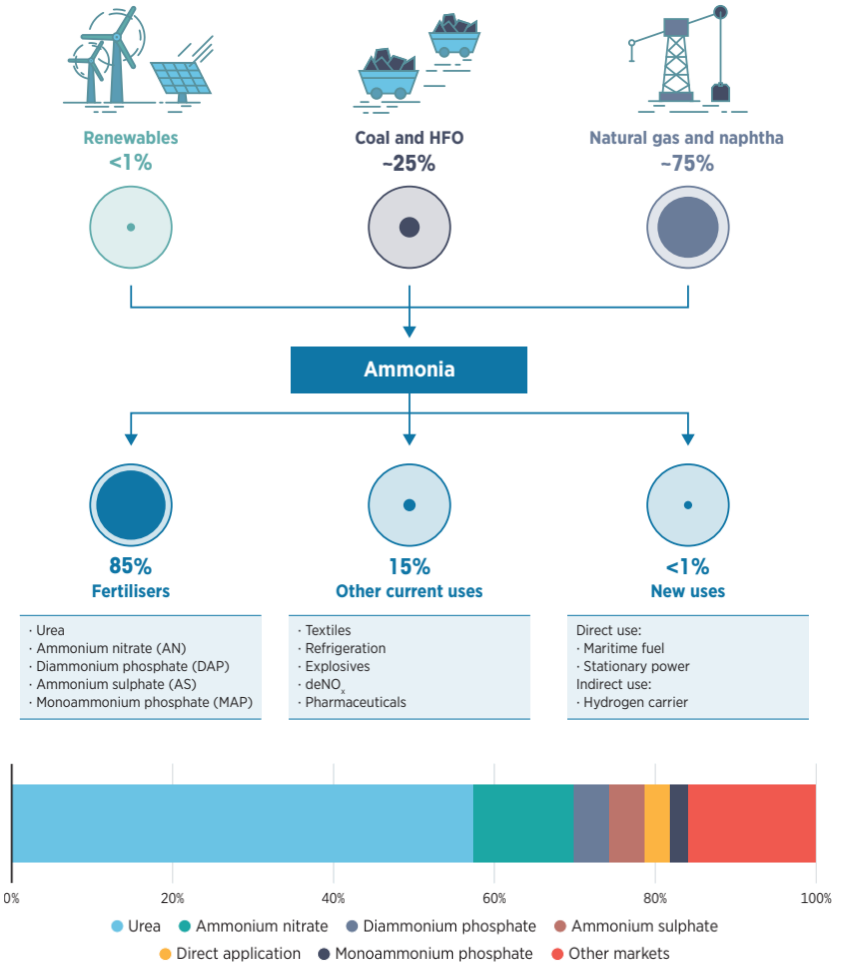
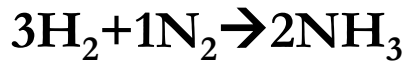
* indicates representation on Board of Directors

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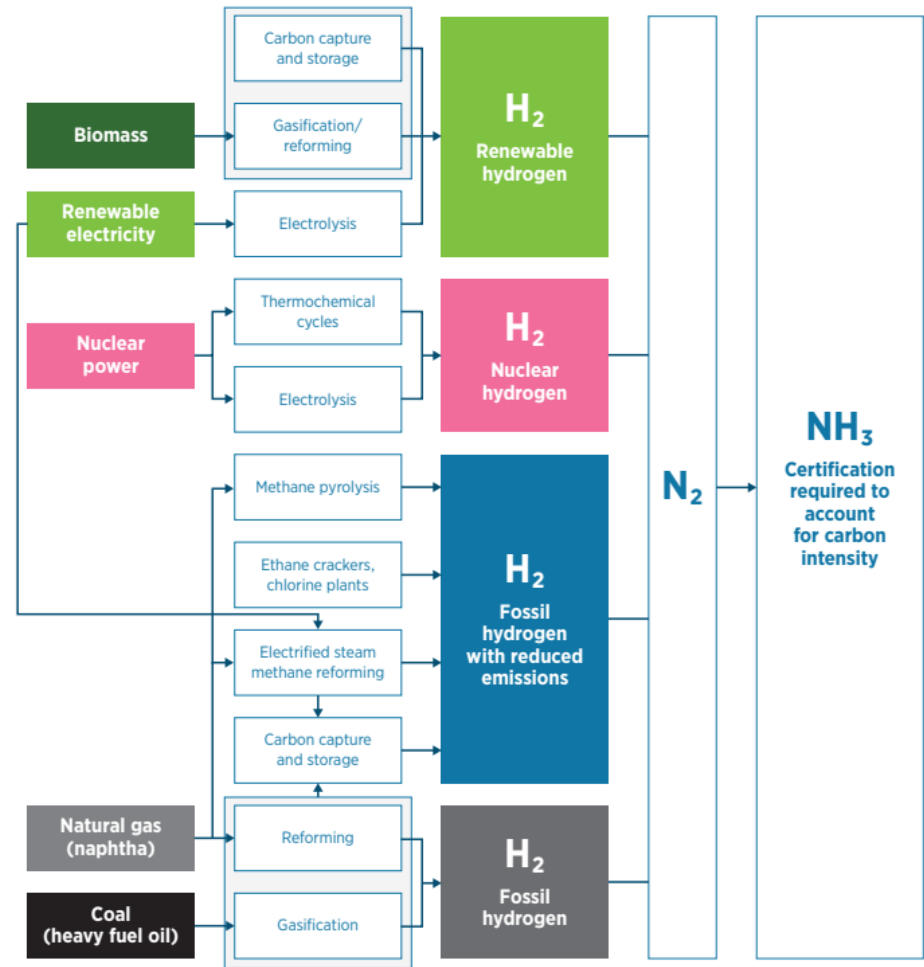
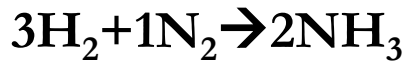
Ammonia

- Ammonia (NH₃) is produced from hydrogen (H₂) and nitrogen (N₂) via the Haber-Bosch process at 350-550°C and 100-450 bar with an Fe catalyst
- About 200 million tonnes annual production, mostly directly converted to derivatives such as urea, ammonium nitrate, etc. (mainly for fertilizers)
- Currently fossil-based production, responsible for 0.5 Gt-CO₂ per annum, or 1% of CO_{2,eq} emissions
- About 17-20 million tonnes (10%) of ammonia is shipped overseas. Including local transport, around 45 million tonnes is transported.



Ammonia

- Ammonia decarbonization is all about decarbonizing the hydrogen feedstock
- About **90% of the energy input** is required for H₂ production, so determines CO₂ footprint!
- Colours of ammonia ≠ carbon footprint, as depends on Scope 1-3 emissions
- Certification is required to account for the carbon intensity



Updates from Europe



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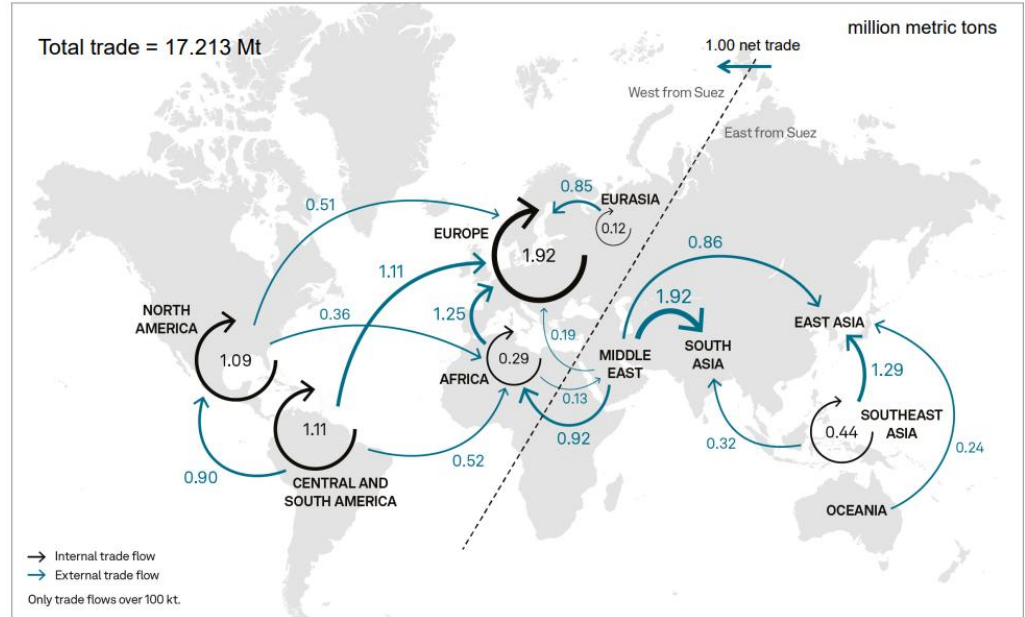
Europe has a theoretical ammonia production capacity of **17.7 million tons (MT)**, produced with hydrogen via natural gas reforming.

- Ammonia accounts for about one-third of hydrogen consumption in Europe.
- Not all capacity is operational, due to high gas prices in Europe, making ammonia imports more cost-competitive in some cases.
- Ammonia imports are expected to increase in the next decades, for current markets and new markets.

New ammonia uses include:

- Ammonia as maritime fuel (bunkering in Rotterdam)
- Ammonia to power and heat
- Ammonia cracking for industrial hydrogen supply

2024 global ammonia trade



Updates from Europe: Policies



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Policies in the European Union aim to decarbonize industry, including the ammonia industry. Various instruments are used, including the ETS, CBAM, and Market Makers.

- ETS and CBAM are not calculated on a Well-to-Gate basis, but Gate-to-Gate (Scope 1 + heat inside boundary for ETS, also including + steam + electricity supply for CBAM)

ETS (Emission Trading System):

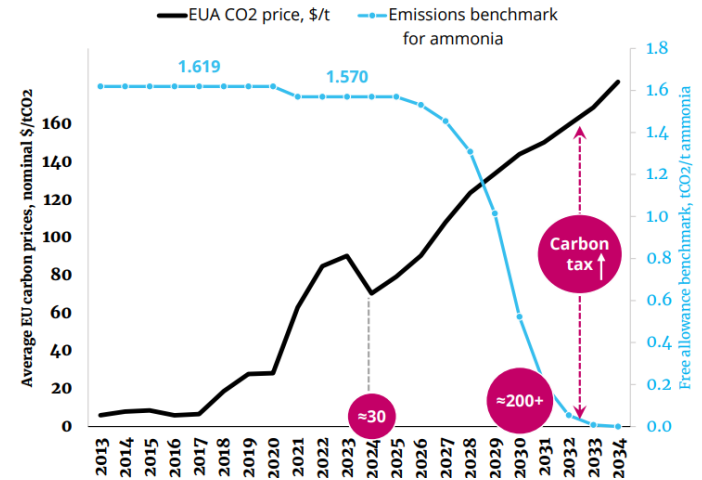
- Emissions are penalized at a CO₂ market price in the ETS.
- Industries currently have “free allowances”, above which they have to enter the ETS. Overcompliance credits may be utilized.

CBAM (Carbon Border Adjustment Mechanism), analogous to a taxation:

- Definitive phase started in January 2026. Emissions to be paid for emissions outside the EU.
- Overcompliance credits cannot be claimed for imported products.

$$\text{CBAM charge} \quad \text{USD / t good} = \left[\begin{array}{c} \text{Embedded Emissions} \\ \text{t CO}_2\text{e / t good} \end{array} - \begin{array}{c} \text{Specific Embedded Free} \\ \text{Allocation (SEFA)} \\ \text{t CO}_2\text{e / t good} \end{array} \right] \times \left[\begin{array}{c} \text{EUA price} \\ \text{USD / t CO}_2 \end{array} - \begin{array}{c} \text{Carbon price paid at} \\ \text{origin country} \\ \text{USD / t CO}_2 \end{array} \right]$$

Phasing out of EUA & outlook for CO₂ prices in Europe



Graph: Argus Media.
Formula: CRU.

Updates from Europe: Market Maker



Innovative financing mechanisms are proposed by early market makers in Europe.

H2Global is a market maker with a double-sided auction approach: long-term supply side auctions & short-term demand-side auctions. The difference between the supply cost and the willingness to pay on the demand side is funded by the German government (and various other governments for specific auctions), via a Contract for Difference (CfD) scheme.

- Fertiglobe's Egypt Green won the pilot auction in 2024, promising to deliver a up to 397,000 tons of renewable ammonia between 2027 and 2033.
- The second edition of H2Global's supply-side auction started in early 2025, covering €2.5 billion, split over five lots (four regional lots and one global lot). The winning bids are expected to be announced toward the end of 2026.

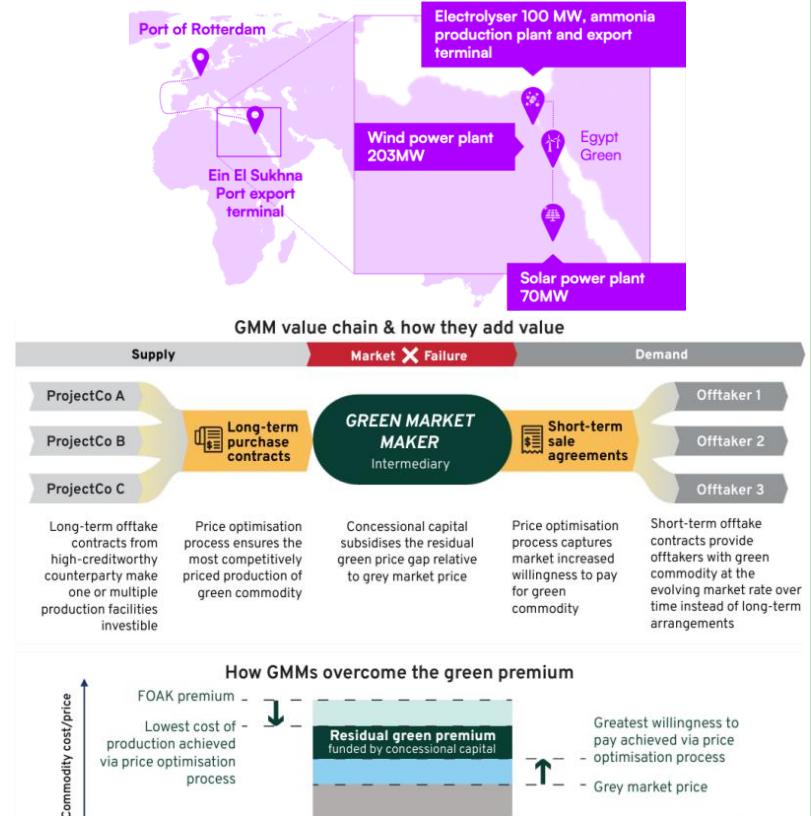


Image: H2Global. Bottom: Mission Possible Partnership.

Updates from Europe: Definitions



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Definitions exist in the European Union regarding RFNBO fuels and low-carbon fuels (hydrogen and derivatives).

RFNBO (Renewable Fuel of Non-Biological Origin, defined under RED):

- Essentially electrolysis-based hydrogen production
- Requirements for temporal correlation, spatial correlation, additionality.
- Monthly matching till 2030, thereafter hourly matching of renewables with electrolyzers. (or maybe not?)
- GHG emission threshold 28.2 gCO_{2e}/MJ

Low-carbon fuels (defined under FuelEU Maritime and ReFuelEU Aviation):

- A more technology agnostic definition. Can be electrolysis-based hydrogen, but also gas-based hydrogen with CCS.
- Lifecycle GHG emission threshold typically 28.2 gCO_{2e}/MJ

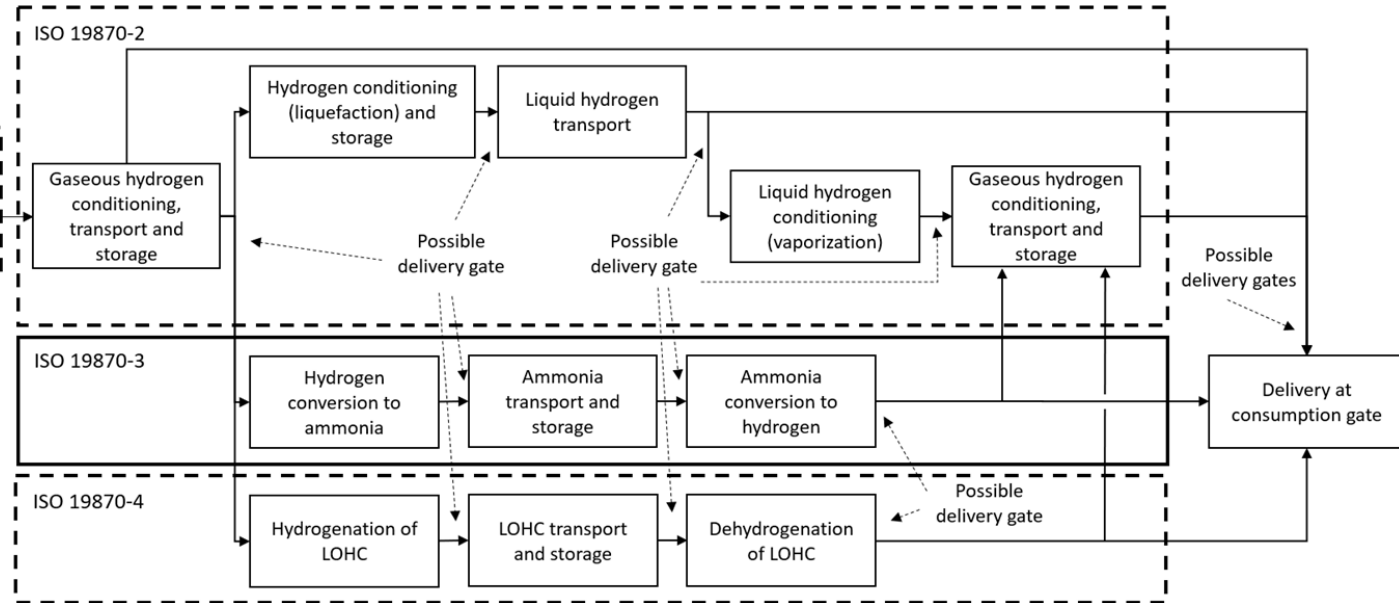


*Graph: Argus Media.
Formula: CRU.*

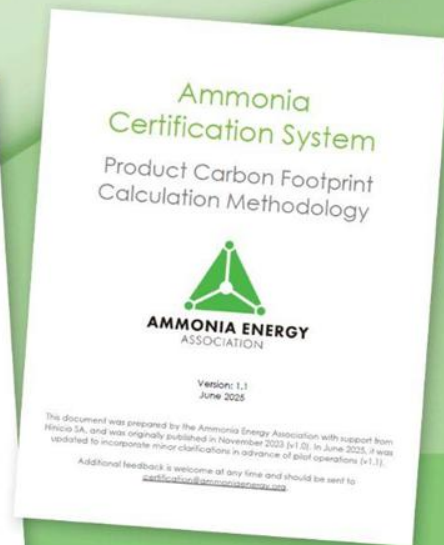
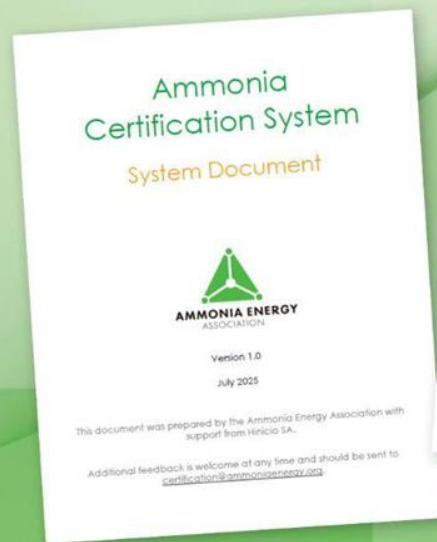
Global Alignment via Standards

AEA is the convener of ISO 19870-3, a methodology in accordance with ISO 14067 to determine the GHG emissions:

- related to the production, storage and transport of ammonia up to the consumption gate and
- related to the conversion of ammonia into hydrogen.



Ammonia Certification System Pilot – Now Operational!



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Ammonia Certification System



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The AEA Ammonia Certification System is designed to **facilitate the global trade** of low-emission ammonia by enabling producers, traders, and consumers to demonstrate relevant attributes of ammonia.

The objective is to **support global alignment** across multiple regions and sectors, including interoperability with third-party certification schemes.

AEA is not defining colors (green/blue) or labels (clean/low-carbon) but collecting robust data on all ammonia produced and traded globally.

We are not certifying that the *product* is good but rather that the *data about the product* is good, thereby building market confidence.

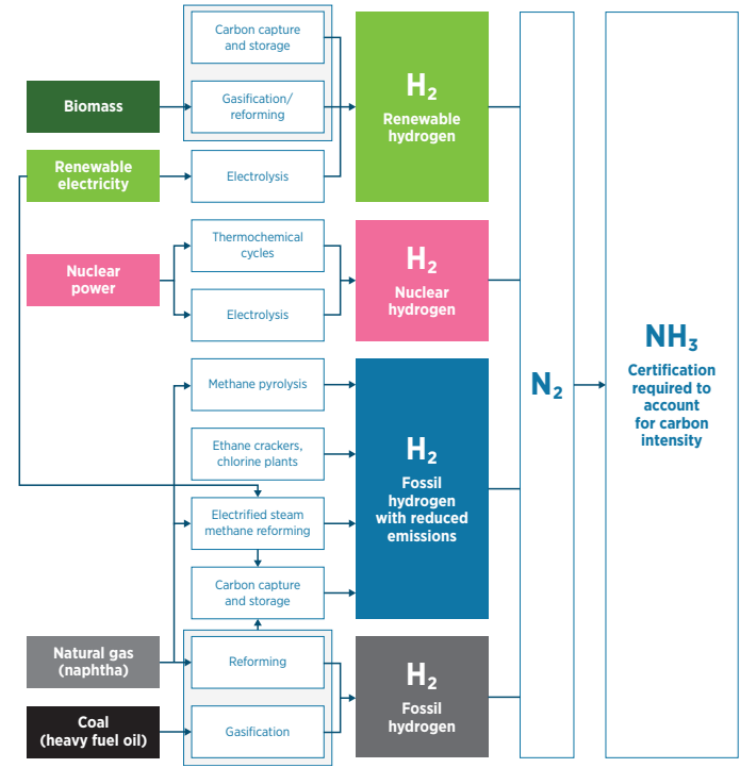


Figure source: *Innovation Outlook: Renewable Ammonia (2022)*, IRENA & AEA
<https://www.irena.org/publications/2022/May/Innovation-Outlook-Renewable-Ammonia>

Ammonia Certification System, Ammonia Energy Association
<https://ammoniaenergy.org/certification/>

Low-emission ammonia projects



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As of February 2026, 404.0 million tons (MT) of Low-emission and Transitional ammonia have been announced.

By 2030, 43.0 MT could become operational

- 6.5 MT is already Operational (up to 2026 Q1)
- 9.2 MT is Firm (eg, under construction / FID)
- 27.3 MT is Mature (eg, offtake / EPC selected / FEED)

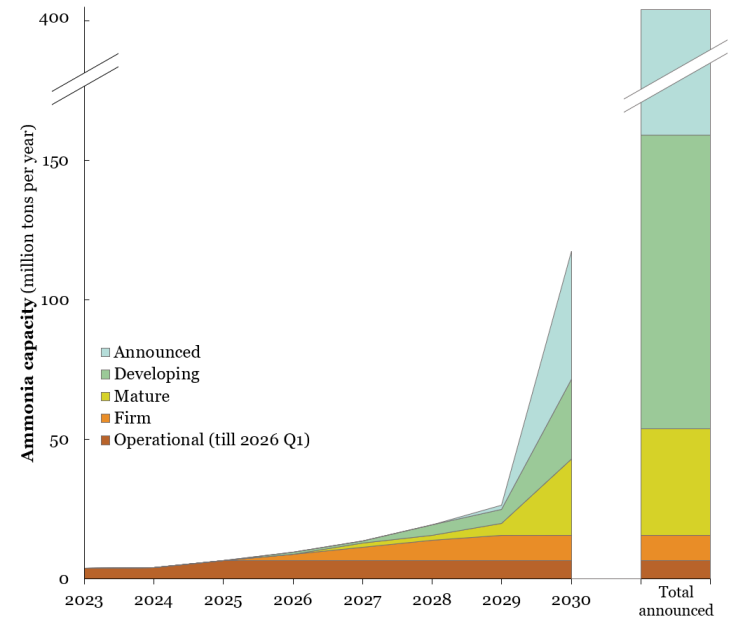
In total, 245.1 MT is classified as Announced with few public details. Another 105.1 MT is Developing (eg, making clear progress to FID), of which 28.7 MT targets to start this decade.

Key conclusions:

- Within the large funnel of projects, a significant number of projects are maturing to meet increasingly clear demand signals.
- Concrete demand, regulatory certainty and successful permitting will be required to move more of these projects towards FID.

Low-emission and transitional ammonia plants

*Global announced capacity: 404.0 million tons of ammonia
2026 Q1*



Low-Emission Ammonia Data, Ammonia Energy Association

<https://ammoniaenergy.org/lead/>

Availability this decade



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Looking only at Operational, Firm, and Mature projects, 43.0 million tons (MT) of Low-emission and Transitional ammonia capacity could be Operational in 2030.

- 5.6 MT of Transitional capacity is already operational. This could increase to 14.0 MT of Transitional capacity in 2030.
- 0.9 MT of Low-emission capacity is already operational. This could increase to 29.0 MT of Low-emission capacity in 2030.
- About half of Low-emission and Transitional capacity this decade comes from Gas reformation projects, totalling 24.1 MT in 2030.
- Water electrolysis projects begin operating at scale in 2025-2026, and could reach 15.1 MT capacity in 2030.

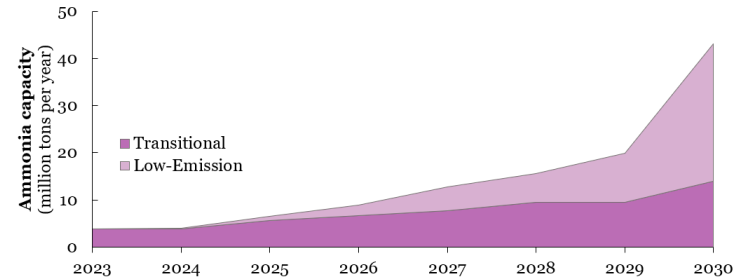
Key conclusions:

- Transitional ammonia plants serve existing markets (fertilizers, chemicals, explosives), but are not expanding long-term.
- Gas reformation projects are developing at large-scale, especially at existing sites. Some Water electrolysis projects are scaling toward the size of Gas reformation projects in the late 2020s.

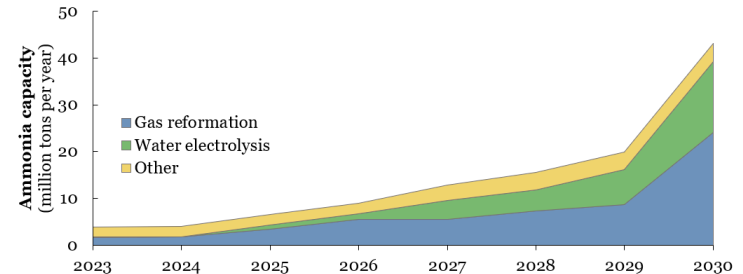
Low-emission and transitional ammonia plants

*43.0 million tons of ammonia by 2030 (Operational, Firm, Mature)
2026 Q1*

By Category (Operational, Firm, Mature)



By Technology pathway (Operational, Firm, Mature)



Low-Emission Ammonia Data, Ammonia Energy Association

<https://ammoniaenergy.org/lead/>

Plants by Region: North America



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Newbuild Gas reformation projects are located in regions with abundant natural gas, such as the US Gulf Coast, the Middle East, and Indonesia.

Projects in the US Gulf Coast mostly focus on Gas reformation with CCS:

- Sometimes at existing ammonia plants and serving existing markets, with some first-mover offtake into energy markets.
- East Asia and Europe are set to become a key offtake market for newbuild Low-emission ammonia capacity.
- 45Q in the United States provides a tax credit for 12 years of around 85 USD per tonne CO₂ stored, which is relevant for newbuild and revamp projects. 45V may also be relevant, but project updates in the last quarter do not yet reflect the impact of 45V.

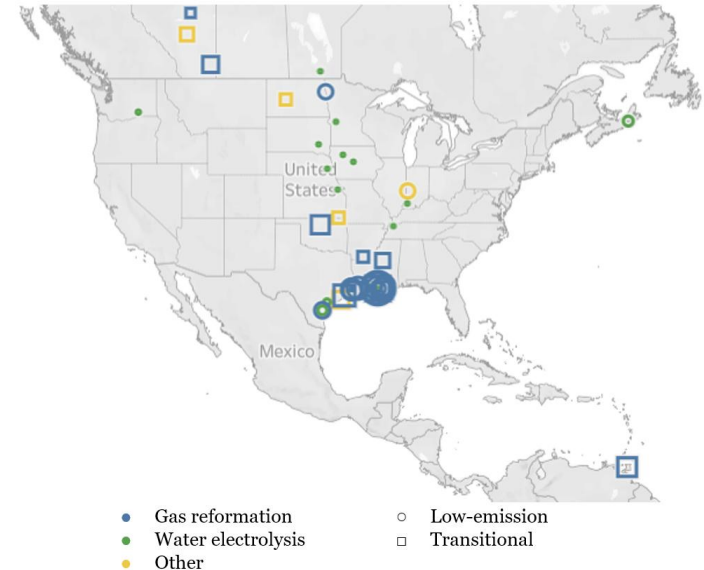
Projects in Eastern Canada focus on Water electrolysis, coupled to wind electricity:

- Initial offtake is focused on Europe, with RFNBO-compliant ammonia production.
- The ammonia plants may also provide grid services in Eastern Canada.

Low-emission and transitional ammonia plants

43.0 million tons of ammonia by 2030 (Operational, Firm, Mature)
2026 Q1

Canada and the United States (Operational, Firm, Mature)



Low-Emission Ammonia Data, Ammonia Energy Association

<https://ammoniaenergy.org/lead/>

Plants by Region: Asia



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Newbuild Water electrolysis projects have various narratives:

- Optimal regions for solar and wind such as Australia, Chile, China, Eastern Canada, Egypt, India, Morocco, Namibia, Saudi Arabia, etc.
- A highly renewable grid with substantial hydropower in Brazil and Norway, and in parts of India.
- Replacing coal-based production in China.

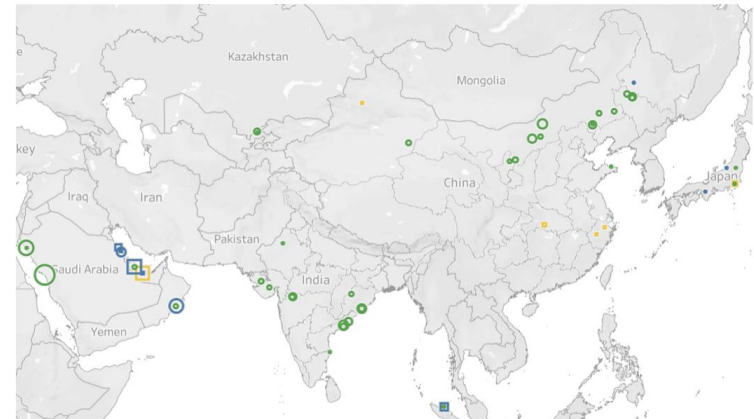
Various Water electrolysis projects are maturing globally, with an emphasis on China, India, and the Middle East:

- In China, 0.6 MT of capacity are already operational, with more 0.2-0.3 MT projects set to become operational in the coming months.
- In China, India and the Middle East, initial offtake of RFNBO-compliant ammonia may be focused on Europe.
- Trading companies are increasingly engaging in offtake with a focus on supplying East Asia and maritime markets.
- Noting that India is a net ammonia importer, ammonia produced via Water electrolysis can displace imports to serve local markets.
- The cost gap between Coal gasification and Water electrolysis is closing in China, implying local offtake may also become significant.

Low-emission and transitional ammonia plants

*43.0 million tons of ammonia by 2030 (Operational, Firm, Mature)
2026 Q1*

China, India and the Middle East (Operational, Firm, Mature)



- Gas reformation
- Water electrolysis
- Other
- Low-emission
- Transitional

Low-Emission Ammonia Data, Ammonia Energy Association

<https://ammoniaenergy.org/lead/>

Renewable ammonia availability: supply can meet maritime demand



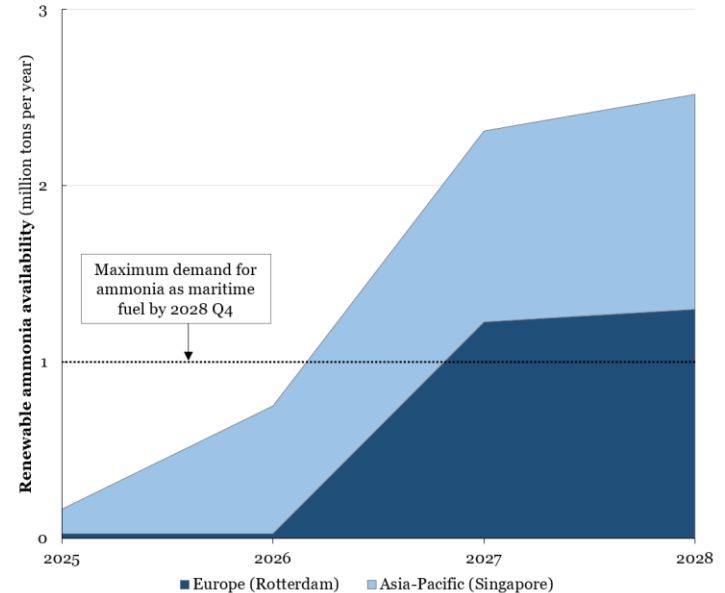
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As of March 2026, the AEA tracks 140 Ammonia-fueled Vessels.

- The 53 ordered Ammonia-fueled vessels will require up to 1.0 MT of ammonia fuel by 2028, assuming these will use ammonia as the primary fuel for all voyages.
- By 2028, 2.5 MT (million tons) of renewable ammonia will be available from coastal & export-based projects, approximately equally split between the Asia-Pacific region (Port of Singapore) and Europe (Port of Rotterdam).
- Depending on size and type of vessel, up to around 125 vessels can be fueled with renewable ammonia until 2028.
- Ammonia fuel availability is not a bottleneck. Decarbonization policies & regulations from the IMO and from regional jurisdictions will determine ammonia maritime fuel adoption.

Renewable ammonia availability

*Global availability: 2.5 million tons of ammonia (operational & under construction; coastal and export projects)
2026 Q2*



Low-Emission Ammonia Data, Ammonia Energy Association

<https://ammoniaenergy.org/lead/>

Updates from Europe: Production



The operational capacity and capacity under construction for low-emission and transitional ammonia in Europe is 0.8 MT.

- Existing gas-based ammonia plants are revamping to decarbonize their assets. Ammonia capacity with partial CCS will be operational in the Netherlands (Yara) in 2026. About 800,000 tons of CO₂ will be liquefied and transported to Norway for permanent storage.
- Also, some operators also blend in biogas in their existing gas-based ammonia plants.
- Various electrolyzer projects are operational, totaling ~100 MW. Examples include BASF in Germany (54 MW), Iberdrola & Fertiberia in Spain (20 MW) and Yara in Norway (24 MW).
- These projects anticipate on the phase out of the Free Allowances in the European ammonia industry by 2034, as well as demand for clean ammonia and derivatives for industry (PLEXIGLAS®), for explosives, and for fertilizers.



Top: Yara. Middle: BASF. Bottom: Fertiberia.

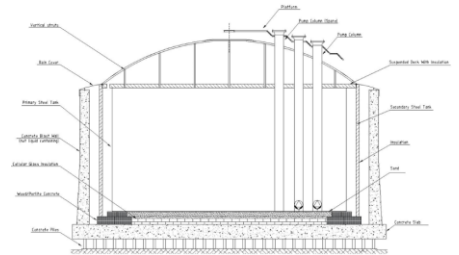
Updates from Europe: Infrastructure



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The clean ammonia energy infrastructure is being demonstrated in Europe.

- Various **ammonia cracking** demonstrations are ongoing in Europe, including Air Liquide's operational 30 t-NH₃/d ammonia cracker, and Uniper & thyssenkrupp Uhde's 28 t-NH₃/d ammonia cracker currently under construction.
- In April 2025, **ammonia bunkering** from ship-to-ship was demonstrated in the Port of Rotterdam. This is in anticipation of the use of ammonia as a maritime fuel.
- Also, ammonia bunkering as a service is shaping up, with partnerships emerging between ammonia terminal operators and bunkering service companies. In October 2025, ammonia terminal operator OCI (soon Agrofert) and bunkering service company VICTROL announced they will team up in the Port of Rotterdam and in other nearby ports.
- Ongoing ISPT Study on **Ammonia to Power** to identify the relevant use cases for ammonia in gas turbines.
- An updated **PGS-12 design code for ammonia storage and handling** was adopted in the Netherlands, in preparation for increased ammonia imports to the Port of Rotterdam.



Top: Air Liquide. Middle: Port of Rotterdam. Bottom: PGS-12.

Global Ammonia Terminal Capacity will expand



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The AEA tracks 944 ammonia terminals, of which 356 are in industrial ports. Assuming 25 turnovers per year, and a similar distribution of importing and exporting terminals in industrial ports, around 108 MT can be currently transported per year. This exceeds the 17-20 MT of ocean-going transport each year, allowing for ammonia trade to expand.

The United States has many inland ammonia terminals and the largest existing capacity (6.5 MT of capacity, including 2.8 MT in coastal ports, and 3.7 MT inland), due to the direct use of ammonia as fertilizer in the US Midwest. This also implies significant inland ammonia transport and storage.

Around the rest of the world, ammonia storage terminals are mostly located in industrial ports, for ammonia import and for ammonia export. New export locations with multiple low-emission ammonia projects also announce centralized storage facilities, such as in Brazil and Namibia.

Ammonia Storage Infrastructure

*Global capacity (Coastal): 8.6 million tons of ammonia storage
2026 Q1*

By Location: Coastal (Operational, Under Development, Closed)



Low-Emission Ammonia Data, Ammonia Energy Association

<https://ammoniaenergy.org/lead/>

Global Ammonia Terminal Capacity will expand in West Europe



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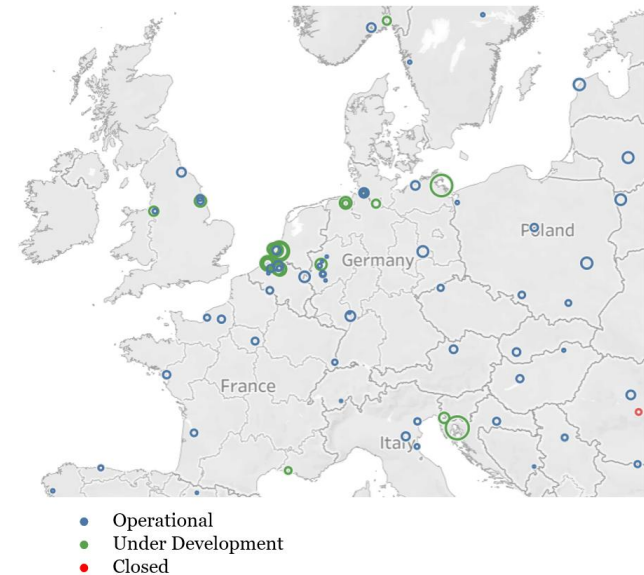
Ammonia Storage Infrastructure in West Europe 2026 Q1

In West Europe, Belgium, Germany, the Netherlands, and the United Kingdom aim to import ammonia for energy applications. Also, the phase out of free allowances for CO₂ emissions in the European industry by 2034 will also result in the import of low-emission ammonia to Europe for existing markets.

Rotterdam (The Netherlands) is the largest port in Europe with 13% of all energy utilized in Europe passing through the Port of Rotterdam. Rotterdam is also a major bunkering hub for vessels.

New import capacity for hydrogen and derivatives has been announced. Assuming 25 turnovers per year, 18.1 million tons (MT) of ammonia throughput capacity is Under Development in the Port of Rotterdam. To account for increased ammonia volumes, the PGS-12 design code for ammonia storage and handling has been updated recently.

By Location: Coastal & Inland (Operational, Under Development, Closed)



Webinar: Updated PGS-12 code: Preparing for increased ammonia imports to the Netherlands
<https://ammoniaenergy.org/webinars/updated-pgs-12-code-preparing-for-increased-ammonia-imports-to-the-netherlands/>

Low-Emission Ammonia Data, Ammonia Energy Association

<https://ammoniaenergy.org/lead/>

Ammonia to Power is Demonstrated as Projects and Policies develop



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As of January 2026, at least 52 Ammonia to Power projects are under development, mostly based on ammonia co-firing in thermal power plants (33 projects) and ammonia-fueled gas turbines (14 projects). These projects have a combined power output of 7.3 GW from ammonia, and could represent up to 20.5 million tons (MT) of ammonia demand.

Most **projects** (48) are located in East Asia, with a significant focus on ammonia co-firing in thermal power plants (30 projects).

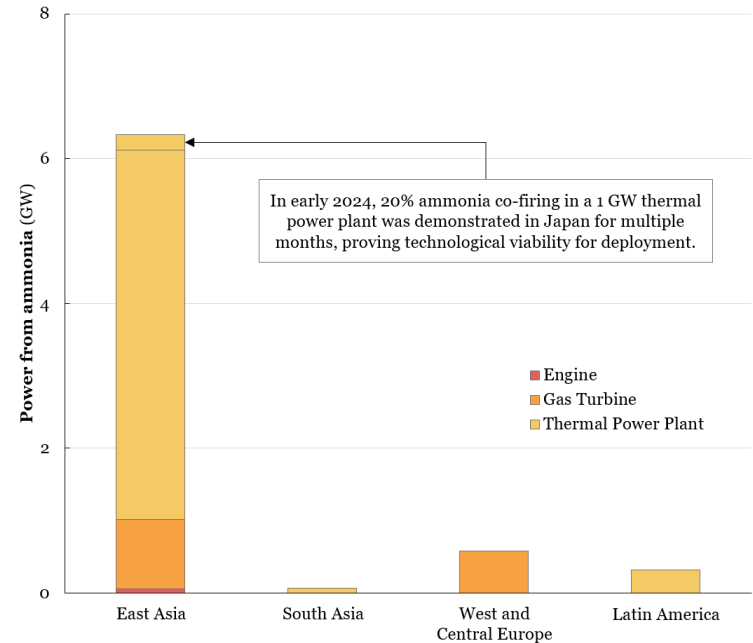
- In 2024, 20% ammonia co-firing in a 1 GW thermal power plant was demonstrated in Japan, with full-scale implementation by the late 2020s or early 2030s.
- The first commercial demonstration of an ammonia-fueled gas turbine will be a 60 MW pilot project in Jurong Port (Singapore).

Significant **policies** are also visible in East Asia.

- Japan awarded ammonia to power capacity via its Contract for Difference (CfD) scheme in 2025.
- South Korea concluded its first ammonia to power auction in 2024.

Power generation from ammonia

Global announced demand: 20.5 million tons of ammonia
2026 Q1



Low-Emission Ammonia Data, Ammonia Energy Association

<https://ammoniaenergy.org/lead/>

Ammonia Cracking is Developing with Pilots Under Construction



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As of January 2026, at least 31 industrial-scale ammonia cracking projects are under development with 2.5 million tons (MT) of hydrogen capacity.

- Depending on the technology choice, this is equivalent to between 14.9 MT and 18.4 MT of ammonia feedstock.
- While most projects are in early stages of development, several pilot-scale crackers are under construction in locations that import energy. The four Firm and Mature projects in East Asia (0.20 MT of hydrogen / 1.2-1.5 MT of ammonia) are focused on power generation and industrial hydrogen supply. The five Operational, Firm and Mature projects in West and Central Europe (0.03 MT of hydrogen / 0.2 MT of ammonia) are focused on industrial hydrogen supply.

In 2022, the RePowerEU plan indicated 4.0 MT of hydrogen would be imported via ammonia by 2030. The ammonia cracking projects announced could supply around half of this target. In addition, however, imports of ammonia for direct use (not cracking) may also be counted within the EU's target.

Ammonia cracking for hydrogen production

*Global announced demand: 14.9-18.4 million tons of ammonia
2026 Q1*



Low-Emission Ammonia Data, Ammonia Energy Association

<https://ammoniaenergy.org/lead/>

Ammonia cracking to hydrogen

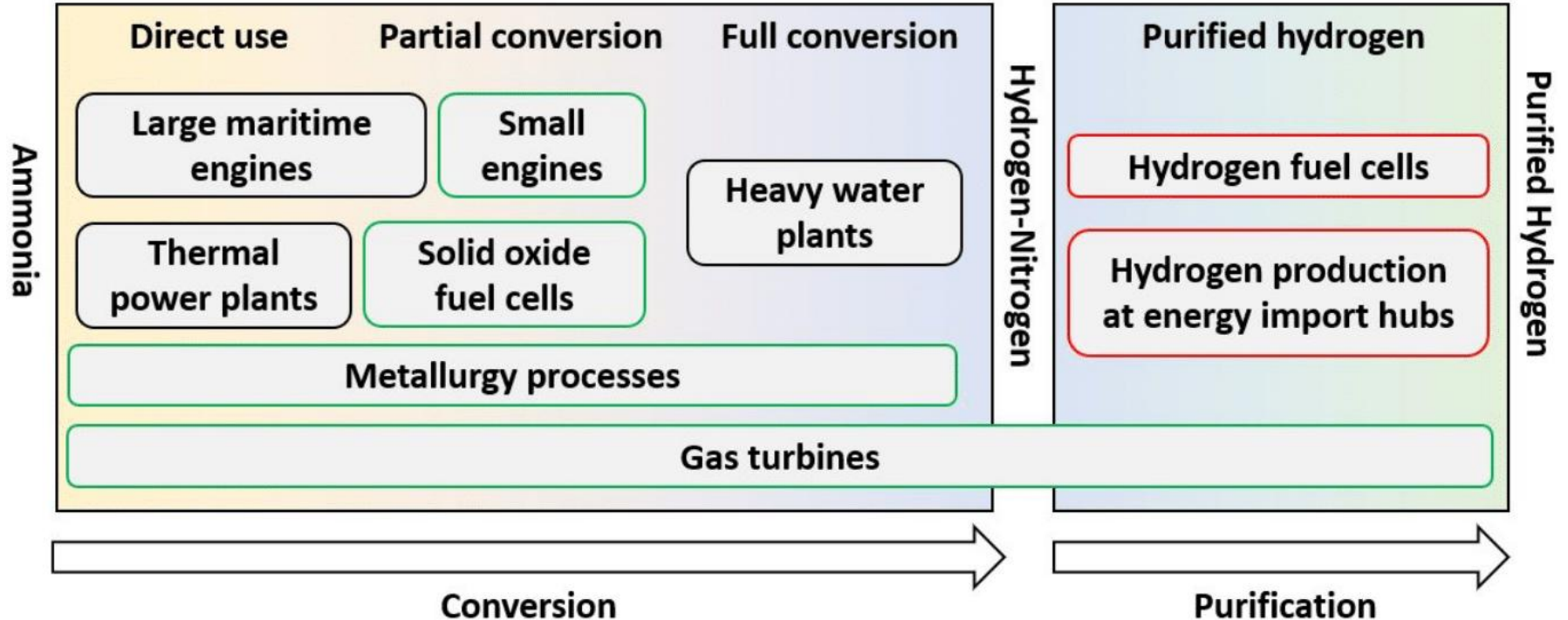


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Heat integration with application possible

No heat integration with application

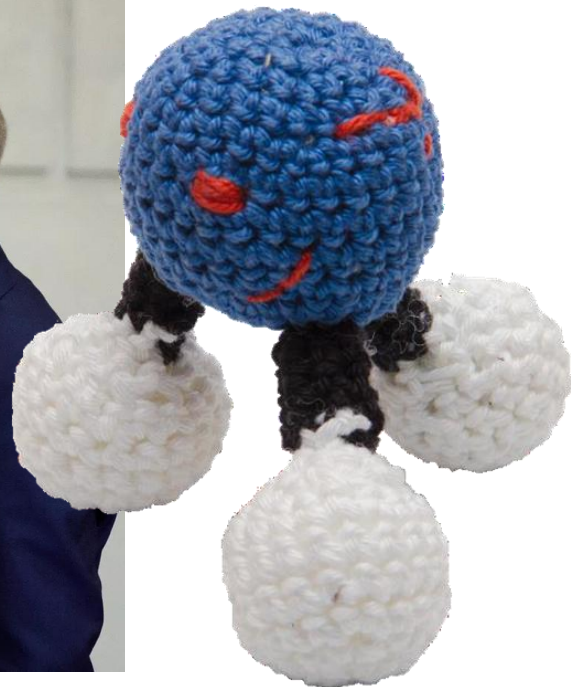
N/A



Policy aspects are important too



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Thank You!

Questions? Email krouwenhorst@ammoniaenergy.org

