

Zero-Emission Shipping Mission Strategic Priorities 2025–2030, approved September 2025

Introduction

This document on Strategic Priorities sets out the Zero-Emission Shipping Mission’s priorities from 2025 to 2030, providing a clear and shared direction based on our [Action Plan](#) and [Roadmap](#) and the maritime industry's current challenges. It aims to help guide the Mission’s actions, projects, and impact monitoring over the next five years.

Vision

The Zero-Emission Shipping Mission (ZESM) aims to demonstrate commercially viable zero-emission ships by 2030 and make ships that operate on zero-emission fuels the natural choice for ship owners when they renew their fleet.

Mission

Accelerate the transition to zero-emission shipping by mobilising public-private collaboration across the maritime value chain: ships, ports, and green fuels. The 2030 goals are:

2030 GOALS	Ships 	Fuels 	Fueling infrastructure 
	600 large ships in international shipping running on well-to-wake zero-emission fuel.	Enable the production of 16 Mt of heavy fuel oil equivalent well-to-wake zero-emission fuels.	20 key ports covering at least three continents offering well-to-wake zero-emission bunkering.

What has ZESM already achieved?

Per the ZESM Roadmap & Action Plan, the Mission’s 2022–2024 priorities focused on building a foundation of knowledge and frameworks by (i) enabling stakeholder dialogue and the collaborative consolidation, creation and sharing of knowledge; and (ii) informing and fostering the creation of harmonised frameworks and standards that would serve as foundation for deployment and market involvement.

During this period, the Mission delivered workshops, events, and technical studies to support dissemination. Some key achievements include:

- Development and coordination of the **ZESM Roadmap & Action Plan**
- Launch of the **Green Corridors Hub** at COP27: a central platform featuring green corridor data, reports, a route tracker, and a stakeholder matchmaker tool

- **Port-fuel supply study** (Singapore Maritime Week 2024): analysis of green methanol and ammonia bunkering supply chains and strategies for port leadership in zero-emission fuels
- Encouraging and Conducting **Green Corridor Pre-Feasibility Studies** and feasibility study now in process.

Understanding the landscape: What ZESM expected vs. where the industry stands

The ZESM Action Plan envisioned 2025–2030 as a period of scalability, embedded safety standards, and integration. From 2024 to 2027, ZESM expected to focus mainly on maturing port-ship interactions and making safety a core element of design and operations, particularly concerning zero-carbon fuels. Early demonstrations are expected to emerge through regional collaboration and resource complementarity. Between 2027 and 2030, the primary focus is expected to be the commercialisation and scaling up of initiatives, primarily through regional integration and the rollout of green corridors.

While the original vision remains relevant, achieving it has proven more complex than initially anticipated. Although significant progress has been made in raising ambition and advancing pilot projects, large-scale deployment is progressing more slowly. Challenges around coordination, access to capital, and market confidence are emerging as key factors influencing the pace of transition. In some cases, industry has hit a feasibility wall, particularly when it comes to commercialising green corridors, financing zero-emission fuel offtake, and scaling up vessel deployment. With the 2030 targets approaching, aligning regulation, investment, and supply chain coordination across actors and regions will be key.

Strategic priorities for 2025–2030

In order to move forward with the sector's decarbonization ZESM has been taking stock on ZESM achievements, and the needs in the maritime landscape and the maritime industry. As a consequence, ZESM's strategic priorities for the period 2025–2030 have been identified. Grounded in ZESM's three-pillar approach spanning ships, ports, and fuels, ZESM sharpens the focus around key areas that align with industry needs, leverage the Mission's strengths, and highlight where ZESM can deliver the most strategic value:

External (content) priorities

Accelerate funding mechanisms and/or solutions for

- Implementing green corridors
- Early deployment efforts
- Increased commercialisation
- Funding the transition cost gap

To be achieved by driving action and visibility, and help set the global agenda on:

- Financing and scaling green corridors and early deployment through
 - Pre-feasibility studies
 - Convening relevant stakeholders to discuss financing solutions and strategies for implementing green corridors

- Regulatory alignment and investment de-risking
- Market pathways for alternative fuels
- Development of safety standards

Internal (process) priorities

Amplify ZESM visibility and credibility by

- Focus on the areas where ZESM can add the most strategic value: knowledge sharing, global convening, and public-private, inter-governmental coordination
- Broaden stakeholder collaboration base, including engaging cargo owners and financial and funding institutions, given their central role in the transition
- Demonstrating measurable impact by introducing intermediate objectives
- Adjusting KPIs where needed to reflect more closely the Mission's contribution to broader goals

To be done by:

- Knowledge sharing and capacity building: Disseminating tools, methodologies, safety standards, and commercialisation strategies to support first movers and accelerate broader industry transition. This also includes revisiting and strengthening existing efforts in key regions and amongst key stakeholders to enhance their relevance and impact within the maritime sector
- Integration of pillar efforts: Prioritising initiatives that connect ships, ports, and fuels, avoiding siloed efforts in favour of holistic and interconnected solutions
- Strategic connectivity: Serving as a trusted facilitator to connect key stakeholders, promote international alignment, and accelerate global maritime decarbonisation.
 - This includes leveraging our networks and being present at relevant major forums (e.g., MI-CEM Ministerial and COP)
 - Bringing together stakeholders from across the maritime ecosystem and build on ZESM's intergovernmental and cross-value chain nature to connect relevant private and public stakeholders, including governments, cargo owners, financial institutions, and industry, to create aligned and scalable solutions

Action Plan areas of focus 2025-2030

Building on ZESM's outlined strategic priorities, the Mission explored its original, broader [Action Plan](#) and identified seven key action areas to focus on from 2025 to 2030. These areas were identified via contributions from Mission members and finally approved by ZESM's Executive Committee. The seven areas represent the most relevant opportunities aligned with the Mission's capabilities, addressing critical shipping transition gaps and providing a foundation to scope ZESM's future work and projects. The seven key Action Plan areas till 2030 are (*not prioritized order, but following original Action plan numbers*):

1. Collect and share best practices/knowledge on safety management on board vessels using zero-emission fuels as propulsion. *Action Plan ID.8*

2. Analyse current and projected zero-emission fuel demand at key ports to determine required supply volumes, linking demand forecasts to investment decisions on production capacity, infrastructure, and bunkering facilities. *Action Plan ID.9*
3. Identify and track the regulatory, commercial, and technological drivers of shipping's future fuel demand, with particular attention to how national government policies shape demand visibility and aggregation. *Action Plan ID.16*
4. Collect and share knowledge on zero-emission fuel design approval processes and standardisation for vessels able to use zero-emission fuels, including new builds and retrofits, with a particular focus on the role of national policy frameworks in complementing and operationalising IMO standards. *Action Plan ID.20*
5. Share best practices and run campaigns on operational manuals and crew training, focusing on zero-emission fuels and crew safety, through mechanisms like regular feedback loops, post-training evaluations, and crew-led improvement suggestions. *Action Plan ID.24*
6. Assess the geographic distribution of future fuel production sites and synthesis capabilities and evaluate port storage and handling potential. Particular emphasis should be placed on ports' role as aggregators and distributors of zero-emission fuels, connecting production hubs with shipping demand. *Action Plan ID.36*
7. Analyse the ease of retrofitting existing refuelling infrastructure to accommodate new fuels. *Action Plan ID.112*

Wrap up

The Zero-Emission Shipping Mission will focus its work around the Strategic Priorities 2025-2030 and the matching, prioritized Action Plan knowledge gaps. An internal Mission evaluation of the priorities will take place in 2028.

Apart from this, intermediate goals and KPIs that track progress and show the Mission's actual contribution and impact will be prioritized. These priorities also reflect ZESM's role in the maritime space. While long-term R&D remains essential, the Mission will focus on deployment, commercialisation, and creating conditions for scaling up the green shipping transition, notably through knowledge sharing and coordinated action.