

Global Coal-based Urea Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Coal-based Urea market size is expected to reach \$ 27718 million by 2032, rising at a market growth of 0.1% CAGR during the forecast period (2026-2032). Coal-based urea production refers to a urea production route that uses coal as the main raw material, producing syngas (mainly composed of carbon monoxide and hydrogen) through coal gasification, followed by chemical processes such as conversion, desulfurization, and ammonia synthesis, ultimately reacting with carbon dioxide to produce urea. This process does not rely on natural gas resources and is suitable for large-scale deployment in areas rich in coal resources. It is one of the important production methods in China's urea industry. Its characteristics include a relatively stable source of raw materials and a complete industrial chain, but its energy consumption and carbon emission levels are relatively high, requiring strict environmental protection and energy efficiency management. In 2025, global production was approximately 74.73 million tons, and currently, coal-based urea production is mainly concentrated in China.

In the global urea industry, coal-based urea, as a unique production route based on coal resources, has long played a vital supporting role in resource-rich countries and regions. Especially in market environments with relatively scarce natural gas resources and abundant coal reserves, coal-based urea not only ensures the security of domestic nitrogen fertilizer supply but also serves as an important industrial link between energy, chemicals, and agriculture. Despite its energy consumption and environmental impact, coal-based urea still occupies an indispensable strategic position in the global urea supply structure.

From a technological perspective, coal-based urea is centered on coal gasification, converting coal into syngas, which is then reacted with carbon dioxide in an ammonia synthesis unit to produce urea, forming a complete integrated production chain. Compared to natural gas-based urea, the coal-based route has significant advantages

in raw material acquisition and supply stability, making it particularly suitable for large-scale deployment in countries and regions with concentrated coal resources and high energy self-sufficiency requirements. This characteristic determines the significant regional concentration of coal-based urea in the global urea industry.

From a market supply perspective, coal-based urea production capacity is mainly concentrated in Asia, with China being the core producer of coal-based urea globally.

Leveraging its abundant coal resources and mature coal chemical industry system, China's coal-based urea accounts for a significant share of global urea supply, exerting a substantial influence on the international market's supply and demand balance.

Meanwhile, some emerging economies are also exploring coal gasification-based urea production pathways to reduce dependence on imported natural gas and fertilizers and enhance their self-sufficiency in agricultural inputs.

In terms of cost structure, coal-based urea exhibits typical 'energy-driven' characteristics, with production costs highly dependent on coal prices, energy efficiency levels, and environmental protection investment. As environmental regulations become stricter and carbon emission reduction pressures increase, the cost advantage of traditional high-energy-consuming coal-based plants is gradually weakening, leading to significant differentiation within the industry: on the one hand, small and medium-sized plants with low energy efficiency and high emissions face pressure to exit the market; on the other hand, large-scale integrated projects employing advanced gasification technology and possessing waste heat recovery and comprehensive utilization capabilities for by-products still maintain strong long-term competitiveness.

From a product structure perspective, coal-based urea is primarily agricultural granular urea, a crucial basic fertilizer source for ensuring food production. Meanwhile, with the upgrading of downstream demand, coal-based urea is gradually extending into areas such as industrial-grade urea and automotive urea raw materials, increasing added value through product diversification. This transformation means that coal-based urea is no longer just a 'low-cost alternative,' but is gradually integrating into a wider range of chemical and environmental applications.

From an industry trend perspective, coal-based urea is at a critical juncture of transformation and upgrading. On the one hand, global carbon emission reduction and energy consumption control policies continue to constrain the coal-based route; on the other hand, through technologies such as efficient coal gasification, clean production, and carbon dioxide recovery, coal-based urea still has room for optimization. Given the rigid demand in agriculture and the prominent demands for resource security, coal-based urea will not quickly disappear from the historical stage, but will enter a new phase of 'quality improvement and quantity reduction, and structural optimization.'

This report studies the global Coal-based Urea production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Coal-based Urea total production and demand, 2021-2032, (Kilotons)

Global Coal-based Urea total production value, 2021-2032, (USD Million)

Global Coal-based Urea production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Coal-based Urea consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Coal-based Urea domestic production, consumption, key domestic manufacturers and share

Global Coal-based Urea production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Coal-based Urea production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Coal-based Urea production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Coal-based Urea 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 LuAn Chemical Technology, China Coal Energy Company, Henan Xinlianxin Fertilizer, Hubei Yihua Chemical, Hualu Hengsheng Chemical, Yuanxing Energy Company, Yunnan Yuntianhua, Huajin Chemical Industries, Zhongneng Chemical, Shaanxi Coal and Chemical Industry, 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 Coal-based Urea market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 Coal-based Urea Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Coal-based Urea Market, Segmentation by Type:

Small Particles

Large Particles

Global Coal-based Urea Market, Segmentation by Raw Materials:

Urea Produced from Bituminous Coal

Urea Produced from Anthracite Coal

Global Coal-based Urea Market, Segmentation by Function:

Regular Urea Granules

Controlled-release Urea Granules

Stable Urea Granules

Global Coal-based Urea Market, Segmentation by Application:

Agriculture

Industrial

Companies Profiled:

LuAn Chemical Technology

China Coal Energy Company

Henan Xinlianxin Fertilizer

Hubei Yihua Chemical

Hualu Hengsheng Chemical

Yuanxing Energy Company

Yunnan Yuntianhua

Huajin Chemical Industries

Zhongneng Chemical

Shaanxi Coal and Chemical Industry

Ruixing Group

Shanxi Tianze Coal Chemical

Key Questions Answered:

1. How big is the global Coal-based Urea market?
2. What is the demand of the global Coal-based Urea market?
3. What is the year over year growth of the global Coal-based Urea market?
4. What is the production and production value of the global Coal-based Urea market?

5. Who are the key producers in the global Coal-based Urea market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Coal-based Urea Introduction
- 1.2 World Coal-based Urea Supply & Forecast
 - 1.2.1 World Coal-based Urea Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Coal-based Urea Production (2021-2032)
 - 1.2.3 World Coal-based Urea Pricing Trends (2021-2032)
- 1.3 World Coal-based Urea Production by Region (Based on Production Site)
 - 1.3.1 World Coal-based Urea Production Value by Region (2021-2032)
 - 1.3.2 World Coal-based Urea Production by Region (2021-2032)
 - 1.3.3 World Coal-based Urea Average Price by Region (2021-2032)
 - 1.3.4 North America Coal-based Urea Production (2021-2032)
 - 1.3.5 Europe Coal-based Urea Production (2021-2032)
 - 1.3.6 China Coal-based Urea Production (2021-2032)
 - 1.3.7 South America Coal-based Urea Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Coal-based Urea Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Coal-based Urea Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Coal-based Urea Demand (2021-2032)
- 2.2 World Coal-based Urea Consumption by Region
 - 2.2.1 World Coal-based Urea Consumption by Region (2021-2026)
 - 2.2.2 World Coal-based Urea Consumption Forecast by Region (2027-2032)
- 2.3 United States Coal-based Urea Consumption (2021-2032)
- 2.4 China Coal-based Urea Consumption (2021-2032)
- 2.5 Europe Coal-based Urea Consumption (2021-2032)
- 2.6 Japan Coal-based Urea Consumption (2021-2032)
- 2.7 South Korea Coal-based Urea Consumption (2021-2032)
- 2.8 ASEAN Coal-based Urea Consumption (2021-2032)
- 2.9 India Coal-based Urea Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Coal-based Urea Production Value by Manufacturer (2021-2026)

- 3.2 World Coal-based Urea Production by Manufacturer (2021-2026)
- 3.3 World Coal-based Urea Average Price by Manufacturer (2021-2026)
- 3.4 Coal-based Urea Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Coal-based Urea Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Coal-based Urea in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Coal-based Urea in 2025
- 3.6 Coal-based Urea Market: Overall Company Footprint Analysis
 - 3.6.1 Coal-based Urea Market: Region Footprint
 - 3.6.2 Coal-based Urea Market: Company Product Type Footprint
 - 3.6.3 Coal-based Urea Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Coal-based Urea Production Value Comparison
 - 4.1.1 United States VS China: Coal-based Urea Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Coal-based Urea Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Coal-based Urea Production Comparison
 - 4.2.1 United States VS China: Coal-based Urea Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Coal-based Urea Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Coal-based Urea Consumption Comparison
 - 4.3.1 United States VS China: Coal-based Urea Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Coal-based Urea Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Coal-based Urea Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Coal-based Urea Manufacturers, Headquarters and Production Site (States, Country)
 - 4.4.2 United States Based Manufacturers Coal-based Urea Production Value

(2021-2026)

4.4.3 United States Based Manufacturers Coal-based Urea Production (2021-2026)

4.5 China Based Coal-based Urea Manufacturers and Market Share

4.5.1 China Based Coal-based Urea Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Coal-based Urea Production Value (2021-2026)

4.5.3 China Based Manufacturers Coal-based Urea Production (2021-2026)

4.6 Rest of World Based Coal-based Urea Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Coal-based Urea Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Coal-based Urea Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Coal-based Urea Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Coal-based Urea Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Small Particles

5.2.2 Large Particles

5.3 Market Segment by Type

5.3.1 World Coal-based Urea Production by Type (2021-2032)

5.3.2 World Coal-based Urea Production Value by Type (2021-2032)

5.3.3 World Coal-based Urea Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY RAW MATERIALS

6.1 World Coal-based Urea Market Size Overview by Raw Materials: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Raw Materials

6.2.1 Urea Produced from Bituminous Coal

6.2.2 Urea Produced from Anthracite Coal

6.3 Market Segment by Raw Materials

6.3.1 World Coal-based Urea Production by Raw Materials (2021-2032)

6.3.2 World Coal-based Urea Production Value by Raw Materials (2021-2032)

6.3.3 World Coal-based Urea Average Price by Raw Materials (2021-2032)

7 MARKET ANALYSIS BY FUNCTION

7.1 World Coal-based Urea Market Size Overview by Function: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Function

7.2.1 Regular Urea Granules

7.2.2 Controlled-release Urea Granules

7.2.3 Stable Urea Granules

7.3 Market Segment by Function

7.3.1 World Coal-based Urea Production by Function (2021-2032)

7.3.2 World Coal-based Urea Production Value by Function (2021-2032)

7.3.3 World Coal-based Urea Average Price by Function (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Coal-based Urea Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Agriculture

8.2.2 Industrial

8.3 Market Segment by Application

8.3.1 World Coal-based Urea Production by Application (2021-2032)

8.3.2 World Coal-based Urea Production Value by Application (2021-2032)

8.3.3 World Coal-based Urea Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 LuAn Chemical Technology

9.1.1 LuAn Chemical Technology Details

9.1.2 LuAn Chemical Technology Major Business

9.1.3 LuAn Chemical Technology Coal-based Urea Product and Services

9.1.4 LuAn Chemical Technology Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 LuAn Chemical Technology Recent Developments/Updates

9.1.6 LuAn Chemical Technology Competitive Strengths & Weaknesses

9.2 China Coal Energy Company

9.2.1 China Coal Energy Company Details

9.2.2 China Coal Energy Company Major Business

9.2.3 China Coal Energy Company Coal-based Urea Product and Services

9.2.4 China Coal Energy Company Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 China Coal Energy Company Recent Developments/Updates

- 9.2.6 China Coal Energy Company Competitive Strengths & Weaknesses
- 9.3 Henan Xinlianxin Fertilizer
 - 9.3.1 Henan Xinlianxin Fertilizer Details
 - 9.3.2 Henan Xinlianxin Fertilizer Major Business
 - 9.3.3 Henan Xinlianxin Fertilizer Coal-based Urea Product and Services
 - 9.3.4 Henan Xinlianxin Fertilizer Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Henan Xinlianxin Fertilizer Recent Developments/Updates
 - 9.3.6 Henan Xinlianxin Fertilizer Competitive Strengths & Weaknesses
- 9.4 Hubei Yihua Chemical
 - 9.4.1 Hubei Yihua Chemical Details
 - 9.4.2 Hubei Yihua Chemical Major Business
 - 9.4.3 Hubei Yihua Chemical Coal-based Urea Product and Services
 - 9.4.4 Hubei Yihua Chemical Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Hubei Yihua Chemical Recent Developments/Updates
 - 9.4.6 Hubei Yihua Chemical Competitive Strengths & Weaknesses
- 9.5 Hualu Hengsheng Chemical
 - 9.5.1 Hualu Hengsheng Chemical Details
 - 9.5.2 Hualu Hengsheng Chemical Major Business
 - 9.5.3 Hualu Hengsheng Chemical Coal-based Urea Product and Services
 - 9.5.4 Hualu Hengsheng Chemical Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Hualu Hengsheng Chemical Recent Developments/Updates
 - 9.5.6 Hualu Hengsheng Chemical Competitive Strengths & Weaknesses
- 9.6 Yuanxing Energy Company
 - 9.6.1 Yuanxing Energy Company Details
 - 9.6.2 Yuanxing Energy Company Major Business
 - 9.6.3 Yuanxing Energy Company Coal-based Urea Product and Services
 - 9.6.4 Yuanxing Energy Company Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Yuanxing Energy Company Recent Developments/Updates
 - 9.6.6 Yuanxing Energy Company Competitive Strengths & Weaknesses
- 9.7 Yunnan Yuntianhua
 - 9.7.1 Yunnan Yuntianhua Details
 - 9.7.2 Yunnan Yuntianhua Major Business
 - 9.7.3 Yunnan Yuntianhua Coal-based Urea Product and Services
 - 9.7.4 Yunnan Yuntianhua Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.7.5 Yunnan Yuntianhua Recent Developments/Updates
- 9.7.6 Yunnan Yuntianhua Competitive Strengths & Weaknesses
- 9.8 Huajin Chemical Industries
 - 9.8.1 Huajin Chemical Industries Details
 - 9.8.2 Huajin Chemical Industries Major Business
 - 9.8.3 Huajin Chemical Industries Coal-based Urea Product and Services
 - 9.8.4 Huajin Chemical Industries Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Huajin Chemical Industries Recent Developments/Updates
 - 9.8.6 Huajin Chemical Industries Competitive Strengths & Weaknesses
- 9.9 Zhongneng Chemical
 - 9.9.1 Zhongneng Chemical Details
 - 9.9.2 Zhongneng Chemical Major Business
 - 9.9.3 Zhongneng Chemical Coal-based Urea Product and Services
 - 9.9.4 Zhongneng Chemical Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Zhongneng Chemical Recent Developments/Updates
 - 9.9.6 Zhongneng Chemical Competitive Strengths & Weaknesses
- 9.10 Shaanxi Coal and Chemical Industry
 - 9.10.1 Shaanxi Coal and Chemical Industry Details
 - 9.10.2 Shaanxi Coal and Chemical Industry Major Business
 - 9.10.3 Shaanxi Coal and Chemical Industry Coal-based Urea Product and Services
 - 9.10.4 Shaanxi Coal and Chemical Industry Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Shaanxi Coal and Chemical Industry Recent Developments/Updates
 - 9.10.6 Shaanxi Coal and Chemical Industry Competitive Strengths & Weaknesses
- 9.11 Ruixing Group
 - 9.11.1 Ruixing Group Details
 - 9.11.2 Ruixing Group Major Business
 - 9.11.3 Ruixing Group Coal-based Urea Product and Services
 - 9.11.4 Ruixing Group Coal-based Urea Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Ruixing Group Recent Developments/Updates
 - 9.11.6 Ruixing Group Competitive Strengths & Weaknesses
- 9.12 Shanxi Tianze Coal Chemical
 - 9.12.1 Shanxi Tianze Coal Chemical Details
 - 9.12.2 Shanxi Tianze Coal Chemical Major Business
 - 9.12.3 Shanxi Tianze Coal Chemical Coal-based Urea Product and Services
 - 9.12.4 Shanxi Tianze Coal Chemical Coal-based Urea Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.12.5 Shanxi Tianze Coal Chemical Recent Developments/Updates

9.12.6 Shanxi Tianze Coal Chemical Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Coal-based Urea Industry Chain

10.2 Coal-based Urea Upstream Analysis

10.2.1 Coal-based Urea Core Raw Materials

10.2.2 Main Manufacturers of Coal-based Urea Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Coal-based Urea Production Mode

10.6 Coal-based Urea Procurement Model

10.7 Coal-based Urea Industry Sales Model and Sales Channels

10.7.1 Coal-based Urea Sales Model

10.7.2 Coal-based Urea Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Coal-based Urea Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Coal-based Urea Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Coal-based Urea Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Coal-based Urea Production Value Market Share by Region (2021-2026)
- Table 5. World Coal-based Urea Production Value Market Share by Region (2027-2032)
- Table 6. World Coal-based Urea Production by Region (2021-2026) & (Kilotons)
- Table 7. World Coal-based Urea Production by Region (2027-2032) & (Kilotons)
- Table 8. World Coal-based Urea Production Market Share by Region (2021-2026)
- Table 9. World Coal-based Urea Production Market Share by Region (2027-2032)
- Table 10. World Coal-based Urea Average Price by Region (2021-2026) & (US\$/Ton)
- Table 11. World Coal-based Urea Average Price by Region (2027-2032) & (US\$/Ton)
- Table 12. Coal-based Urea Major Market Trends
- Table 13. World Coal-based Urea Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kilotons)
- Table 14. World Coal-based Urea Consumption by Region (2021-2026) & (Kilotons)
- Table 15. World Coal-based Urea Consumption Forecast by Region (2027-2032) & (Kilotons)
- Table 16. World Coal-based Urea Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Coal-based Urea Producers in 2025
- Table 18. World Coal-based Urea Production by Manufacturer (2021-2026) & (Kilotons)
- Table 19. Production Market Share of Key Coal-based Urea Producers in 2025
- Table 20. World Coal-based Urea Average Price by Manufacturer (2021-2026) & (US\$/Ton)
- Table 21. Global Coal-based Urea Company Evaluation Quadrant
- Table 22. World Coal-based Urea Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and Coal-based Urea Production Site of Key Manufacturer
- Table 24. Coal-based Urea Market: Company Product Type Footprint
- Table 25. Coal-based Urea Market: Company Product Application Footprint

Table 26. Coal-based Urea Competitive Factors

Table 27. Coal-based Urea New Entrant and Capacity Expansion Plans

Table 28. Coal-based Urea Mergers & Acquisitions Activity

Table 29. United States VS China Coal-based Urea Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Coal-based Urea Production Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 31. United States VS China Coal-based Urea Consumption Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 32. United States Based Coal-based Urea Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Coal-based Urea Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Coal-based Urea Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Coal-based Urea Production (2021-2026) & (Kilotons)

Table 36. United States Based Manufacturers Coal-based Urea Production Market Share (2021-2026)

Table 37. China Based Coal-based Urea Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Coal-based Urea Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Coal-based Urea Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Coal-based Urea Production, (2021-2026) & (Kilotons)

Table 41. China Based Manufacturers Coal-based Urea Production Market Share (2021-2026)

Table 42. Rest of World Based Coal-based Urea Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Coal-based Urea Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Coal-based Urea Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Coal-based Urea Production, (2021-2026) & (Kilotons)

Table 46. Rest of World Based Manufacturers Coal-based Urea Production Market Share (2021-2026)

Table 47. World Coal-based Urea Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Coal-based Urea Production by Type (2021-2026) & (Kilotons)

Table 49. World Coal-based Urea Production by Type (2027-2032) & (Kilotons)

Table 50. World Coal-based Urea Production Value by Type (2021-2026) & (USD Million)

Table 51. World Coal-based Urea Production Value by Type (2027-2032) & (USD Million)

Table 52. World Coal-based Urea Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Coal-based Urea Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Coal-based Urea Production Value by Raw Materials, (USD Million), 2021 & 2025 & 2032

Table 55. World Coal-based Urea Production by Raw Materials (2021-2026) & (Kilotons)

Table 56. World Coal-based Urea Production by Raw Materials (2027-2032) & (Kilotons)

Table 57. World Coal-based Urea Production Value by Raw Materials (2021-2026) & (USD Million)

Table 58. World Coal-based Urea Production Value by Raw Materials (2027-2032) & (USD Million)

Table 59. World Coal-based Urea Average Price by Raw Materials (2021-2026) & (US\$/Ton)

Table 60. World Coal-based Urea Average Price by Raw Materials (2027-2032) & (US\$/Ton)

Table 61. World Coal-based Urea Production Value by Function, (USD Million), 2021 & 2025 & 2032

Table 62. World Coal-based Urea Production by Function (2021-2026) & (Kilotons)

Table 63. World Coal-based Urea Production by Function (2027-2032) & (Kilotons)

Table 64. World Coal-based Urea Production Value by Function (2021-2026) & (USD Million)

Table 65. World Coal-based Urea Production Value by Function (2027-2032) & (USD Million)

Table 66. World Coal-based Urea Average Price by Function (2021-2026) & (US\$/Ton)

Table 67. World Coal-based Urea Average Price by Function (2027-2032) & (US\$/Ton)

Table 68. World Coal-based Urea Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Coal-based Urea Production by Application (2021-2026) & (Kilotons)

Table 70. World Coal-based Urea Production by Application (2027-2032) & (Kilotons)

Table 71. World Coal-based Urea Production Value by Application (2021-2026) & (USD Million)

Million)

Table 72. World Coal-based Urea Production Value by Application (2027-2032) & (USD Million)

Table 73. World Coal-based Urea Average Price by Application (2021-2026) & (US\$/Ton)

Table 74. World Coal-based Urea Average Price by Application (2027-2032) & (US\$/Ton)

Table 75. LuAn Chemical Technology Basic Information, Manufacturing Base and Competitors

Table 76. LuAn Chemical Technology Major Business

Table 77. LuAn Chemical Technology Coal-based Urea Product and Services

Table 78. LuAn Chemical Technology Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. LuAn Chemical Technology Recent Developments/Updates

Table 80. LuAn Chemical Technology Competitive Strengths & Weaknesses

Table 81. China Coal Energy Company Basic Information, Manufacturing Base and Competitors

Table 82. China Coal Energy Company Major Business

Table 83. China Coal Energy Company Coal-based Urea Product and Services

Table 84. China Coal Energy Company Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. China Coal Energy Company Recent Developments/Updates

Table 86. China Coal Energy Company Competitive Strengths & Weaknesses

Table 87. Henan Xinlianxin Fertilizer Basic Information, Manufacturing Base and Competitors

Table 88. Henan Xinlianxin Fertilizer Major Business

Table 89. Henan Xinlianxin Fertilizer Coal-based Urea Product and Services

Table 90. Henan Xinlianxin Fertilizer Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Henan Xinlianxin Fertilizer Recent Developments/Updates

Table 92. Henan Xinlianxin Fertilizer Competitive Strengths & Weaknesses

Table 93. Hubei Yihua Chemical Basic Information, Manufacturing Base and Competitors

Table 94. Hubei Yihua Chemical Major Business

Table 95. Hubei Yihua Chemical Coal-based Urea Product and Services

Table 96. Hubei Yihua Chemical Coal-based Urea Production (Kilotons), Price

(US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Hubei Yihua Chemical Recent Developments/Updates

Table 98. Hubei Yihua Chemical Competitive Strengths & Weaknesses

Table 99. Hualu Hengsheng Chemical Basic Information, Manufacturing Base and Competitors

Table 100. Hualu Hengsheng Chemical Major Business

Table 101. Hualu Hengsheng Chemical Coal-based Urea Product and Services

Table 102. Hualu Hengsheng Chemical Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Hualu Hengsheng Chemical Recent Developments/Updates

Table 104. Hualu Hengsheng Chemical Competitive Strengths & Weaknesses

Table 105. Yuanxing Energy Company Basic Information, Manufacturing Base and Competitors

Table 106. Yuanxing Energy Company Major Business

Table 107. Yuanxing Energy Company Coal-based Urea Product and Services

Table 108. Yuanxing Energy Company Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Yuanxing Energy Company Recent Developments/Updates

Table 110. Yuanxing Energy Company Competitive Strengths & Weaknesses

Table 111. Yunnan Yuntianhua Basic Information, Manufacturing Base and Competitors

Table 112. Yunnan Yuntianhua Major Business

Table 113. Yunnan Yuntianhua Coal-based Urea Product and Services

Table 114. Yunnan Yuntianhua Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Yunnan Yuntianhua Recent Developments/Updates

Table 116. Yunnan Yuntianhua Competitive Strengths & Weaknesses

Table 117. Huajin Chemical Industries Basic Information, Manufacturing Base and Competitors

Table 118. Huajin Chemical Industries Major Business

Table 119. Huajin Chemical Industries Coal-based Urea Product and Services

Table 120. Huajin Chemical Industries Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Huajin Chemical Industries Recent Developments/Updates

Table 122. Huajin Chemical Industries Competitive Strengths & Weaknesses

- Table 123. Zhongneng Chemical Basic Information, Manufacturing Base and Competitors
- Table 124. Zhongneng Chemical Major Business
- Table 125. Zhongneng Chemical Coal-based Urea Product and Services
- Table 126. Zhongneng Chemical Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. Zhongneng Chemical Recent Developments/Updates
- Table 128. Zhongneng Chemical Competitive Strengths & Weaknesses
- Table 129. Shaanxi Coal and Chemical Industry Basic Information, Manufacturing Base and Competitors
- Table 130. Shaanxi Coal and Chemical Industry Major Business
- Table 131. Shaanxi Coal and Chemical Industry Coal-based Urea Product and Services
- Table 132. Shaanxi Coal and Chemical Industry Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. Shaanxi Coal and Chemical Industry Recent Developments/Updates
- Table 134. Shaanxi Coal and Chemical Industry Competitive Strengths & Weaknesses
- Table 135. Ruixing Group Basic Information, Manufacturing Base and Competitors
- Table 136. Ruixing Group Major Business
- Table 137. Ruixing Group Coal-based Urea Product and Services
- Table 138. Ruixing Group Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Ruixing Group Recent Developments/Updates
- Table 140. Ruixing Group Competitive Strengths & Weaknesses
- Table 141. Shanxi Tianze Coal Chemical Basic Information, Manufacturing Base and Competitors
- Table 142. Shanxi Tianze Coal Chemical Major Business
- Table 143. Shanxi Tianze Coal Chemical Coal-based Urea Product and Services
- Table 144. Shanxi Tianze Coal Chemical Coal-based Urea Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 145. Shanxi Tianze Coal Chemical Recent Developments/Updates
- Table 146. Shanxi Tianze Coal Chemical Competitive Strengths & Weaknesses
- Table 147. Global Key Players of Coal-based Urea Upstream (Raw Materials)
- Table 148. Global Coal-based Urea Typical Customers
- Table 149. Coal-based Urea Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Coal-based Urea Picture

Figure 2. World Coal-based Urea Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Coal-based Urea Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Coal-based Urea Production (2021-2032) & (Kilotons)

Figure 5. World Coal-based Urea Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Coal-based Urea Production Value Market Share by Region (2021-2032)

Figure 7. World Coal-based Urea Production Market Share by Region (2021-2032)

Figure 8. North America Coal-based Urea Production (2021-2032) & (Kilotons)

Figure 9. Europe Coal-based Urea Production (2021-2032) & (Kilotons)

Figure 10. China Coal-based Urea Production (2021-2032) & (Kilotons)

Figure 11. South America Coal-based Urea Production (2021-2032) & (Kilotons)

Figure 12. Coal-based Urea Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Coal-based Urea Consumption (2021-2032) & (Kilotons)

Figure 15. World Coal-based Urea Consumption Market Share by Region (2021-2032)

Figure 16. United States Coal-based Urea Consumption (2021-2032) & (Kilotons)

Figure 17. China Coal-based Urea Consumption (2021-2032) & (Kilotons)

Figure 18. Europe Coal-based Urea Consumption (2021-2032) & (Kilotons)

Figure 19. Japan Coal-based Urea Consumption (2021-2032) & (Kilotons)

Figure 20. South Korea Coal-based Urea Consumption (2021-2032) & (Kilotons)

Figure 21. ASEAN Coal-based Urea Consumption (2021-2032) & (Kilotons)

Figure 22. India Coal-based Urea Consumption (2021-2032) & (Kilotons)

Figure 23. Producer Shipments of Coal-based Urea by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Coal-based Urea Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Coal-based Urea Markets in 2025

Figure 26. United States VS China: Coal-based Urea Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Coal-based Urea Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Coal-based Urea Consumption Market Share

Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Coal-based Urea Production Market Share 2025

Figure 30. China Based Manufacturers Coal-based Urea Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Coal-based Urea Production Market Share 2025

Figure 32. World Coal-based Urea Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Coal-based Urea Production Value Market Share by Type in 2025

Figure 34. Small Particles

Figure 35. Large Particles

Figure 36. World Coal-based Urea Production Market Share by Type (2021-2032)

Figure 37. World Coal-based Urea Production Value Market Share by Type (2021-2032)

Figure 38. World Coal-based Urea Average Price by Type (2021-2032) & (US\$/Ton)

Figure 39. World Coal-based Urea Production Value by Raw Materials, (USD Million), 2021 & 2025 & 2032

Figure 40. World Coal-based Urea Production Value Market Share by Raw Materials in 2025

Figure 41. Urea Produced from Bituminous Coal

Figure 42. Urea Produced from Anthracite Coal

Figure 43. World Coal-based Urea Production Market Share by Raw Materials (2021-2032)

Figure 44. World Coal-based Urea Production Value Market Share by Raw Materials (2021-2032)

Figure 45. World Coal-based Urea Average Price by Raw Materials (2021-2032) & (US\$/Ton)

Figure 46. World Coal-based Urea Production Value by Function, (USD Million), 2021 & 2025 & 2032

Figure 47. World Coal-based Urea Production Value Market Share by Function in 2025

Figure 48. Regular Urea Granules

Figure 49. Controlled-release Urea Granules

Figure 50. Stable Urea Granules

Figure 51. World Coal-based Urea Production Market Share by Function (2021-2032)

Figure 52. World Coal-based Urea Production Value Market Share by Function (2021-2032)

Figure 53. World Coal-based Urea Average Price by Function (2021-2032) & (US\$/Ton)

Figure 54. World Coal-based Urea Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 55. World Coal-based Urea Production Value Market Share by Application in

2025

Figure 56. Agriculture

Figure 57. Industrial

Figure 58. World Coal-based Urea Production Market Share by Application (2021-2032)

Figure 59. World Coal-based Urea Production Value Market Share by Application (2021-2032)

Figure 60. World Coal-based Urea Average Price by Application (2021-2032) & (US\$/Ton)

Figure 61. Coal-based Urea Industry Chain

Figure 62. Coal-based Urea Procurement Model

Figure 63. Coal-based Urea Sales Model

Figure 64. Coal-based Urea Sales Channels, Direct Sales, and Distribution

Figure 65. Methodology

Figure 66. Research Process and Data Source

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