

Global Coal-based Urea Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Coal-based Urea market size was valued at US\$ 27254 million in 2025 and is forecast to a readjusted size of US\$ 27718 million by 2032 with a CAGR of 0.1% during review period.

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 is a detailed and comprehensive analysis for global Coal-based Urea market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Coal-based Urea market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Coal-based Urea market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Coal-based Urea market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Coal-based Urea market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Coal-based Urea

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Coal-based Urea market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Coal-based Urea market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Small Particles

Large Particles

Market segment by Raw Materials

Urea Produced from Bituminous Coal

Urea Produced from Anthracite Coal

Market segment by Function

Regular Urea Granules

Controlled-release Urea Granules

Stable Urea Granules

Market segment by Application

Agriculture

Industrial

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Coal-based Urea product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Coal-based Urea, with price, sales quantity, revenue, and global market share of Coal-based Urea from 2021 to 2026.

Chapter 3, the Coal-based Urea competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Coal-based Urea breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Coal-based Urea market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Coal-based Urea.

Chapter 14 and 15, to describe Coal-based Urea sales channel, distributors, customers, research findings and conclusion.

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