

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

<https://marketpublishers.com/r/GDC0A4A493B2EN.html>

Date: April 2026

Pages: 114

Price: US\$ 3,480.00 (Single User License)

ID: GDC0A4A493B2EN

## Abstracts

According to our (Global Info Research) latest study, the global Gas-based Urea market size was valued at US\$ 50767 million in 2025 and is forecast to a readjusted size of US\$ 51626 million by 2032 with a CAGR of 0.1% during review period.

Gas-based urea refers to urea produced primarily from natural gas. 'Gas-based' means 'gas-sourced,' meaning the upstream process involves reforming natural gas steam to produce hydrogen, then separating the hydrogen from air to synthesize ammonia, and finally reacting carbon dioxide with ammonia to produce urea. Compared to coal-based urea, gas-based urea typically has lower energy consumption, relatively lower emissions, and higher product purity. Its production cost is highly correlated with natural gas prices, giving it a significant cost advantage in regions rich in natural gas resources, such as the Middle East, North America, and Russia. In global trade, gas-based urea is primarily used in the export market and is one of the important pricing bases for international urea prices. In 2025, global gas-based urea production was approximately 138.81 million tons.

Gas-based urea refers to urea produced primarily from natural gas. Its production process involves natural gas steam reforming to produce hydrogen, which is then used to synthesize ammonia and further converted into urea. Compared to coal-based urea, gas-based urea has significant advantages in energy consumption, carbon emissions, and product purity, making it a mainstream category in global export trade and a crucial benchmark for international urea prices. With global energy structure adjustments and cyclical fluctuations in natural gas prices, the gas-based urea market is exhibiting stronger cost sensitivity and regional differentiation.

In recent years, the global gas-based urea market has maintained a stable and

fluctuating growth trend. The agricultural sector remains the core consumer, accounting for over 60%, primarily used for food and cash crop cultivation. In the industrial sector, gas-based urea continues to grow in downstream applications such as melamine, urea-formaldehyde resin, and automotive urea solution (SCR denitrification systems). Due to the lower impurity content of gas-based products, they are more suitable for high-end industrial applications, resulting in relatively higher added value. In the coming years, driven by both global food security policies and increasingly stringent environmental regulations, the demand structure for gas-based urea will continue to optimize.

From an industry chain perspective, the core cost of gas-based urea production comes from natural gas prices. Natural gas accounts for approximately 60%-80% of production costs, therefore, fluctuations in international gas prices directly impact corporate profitability and global trade flows. The Middle East, North America, Russia, and some Central Asian countries have become major global supply bases due to their natural gas resource advantages. The Middle East, in particular, has a high export share and is a significant source of supply in the global spot market. The European market is heavily influenced by gas price fluctuations, resulting in cyclical changes in capacity utilization. Asia is primarily an import-dependent market, with India and Southeast Asia being key growth markets for demand.

In terms of the competitive landscape, the industry is dominated by resource-based companies. Companies with upstream natural gas resources or long-term low-price gas supply agreements possess significant cost advantages. Leading companies are continuously increasing their market share by expanding large-scale integrated ammonia-urea plants, optimizing energy efficiency, and strengthening international trade channels. Meanwhile, the development trends of low-carbon production technologies and blue ammonia and green ammonia will also have a profound impact on the future structure of the gas-based urea industry.

Looking ahead, the global gas-based urea market will face three key variables: first, international natural gas price trends; second, changes in global food demand and agricultural subsidy policies; and third, carbon emission policies and the progress of energy transition. Highly efficient and energy-saving equipment, large-scale integrated production, and regional resource advantages will become the core of corporate competitiveness.

This report is a detailed and comprehensive analysis for global Gas-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 Gas-based Urea market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

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

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

Global Gas-based Urea market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), 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 Gas-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 Gas-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 Yara, CF Industries, QAFCO, SABIC, IFFCO, EuroChem, Pupuk Kaltim, OCI NV, KOCH, Acron, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

### **Market Segmentation**

Gas-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

Large Granule Urea

Small Granule Urea

#### Market segment by Process

Carbon Dioxide Stripping Method

Aqueous Solution Full Circulation Method

#### Market segment by Function

Regular Urea Granules

Controlled-release Urea Granules

Stable Urea Granules

#### Market segment by Application

Agriculture

Industrial

#### Major players covered

Yara

CF Industries

QAFCO

SABIC

IFFCO

EuroChem

Pupuk Kaltim

OCI NV

KOCH

Acron

Notore Chemical

Profertil SA

CNPC

Lutianhua Group

Sichuan Meifeng Chemical Industry

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 Gas-based Urea product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Gas-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 Gas-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 Gas-based Urea.

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

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