

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

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Abstracts

The global Gas-based Urea market size is expected to reach \$ 51626 million by 2032, rising at a market growth of 0.1% CAGR during the forecast period (2026-2032).

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 studies the global Gas-based Urea production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Gas-based Urea total production and demand, 2021-2032, (Tons)

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

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

Global Gas-based Urea consumption by region & country, CAGR, 2021-2032 & (Tons)

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

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

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

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

This report profiles key players in the global Gas-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 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.

Stakeholders would have ease in decision-making through various strategy matrices

used in analyzing the World Gas-based Urea market

Detailed Segmentation:

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Gas-based Urea Market, Segmentation by Type:

Large Granule Urea

Small Granule Urea

Global Gas-based Urea Market, Segmentation by Process:

Carbon Dioxide Stripping Method

Aqueous Solution Full Circulation Method

Global Gas-based Urea Market, Segmentation by Function:

Regular Urea Granules

Controlled-release Urea Granules

Stable Urea Granules

Global Gas-based Urea Market, Segmentation by Application:

Agriculture

Industrial

Companies Profiled:

Yara

CF Industries

QAFCO

SABIC

IFFCO

EuroChem

Pupuk Kaltim

OCI NV

KOCH

Acron

Notore Chemical

Profertil SA

CNPC

Lutianhua Group

Sichuan Meifeng Chemical Industry

Key Questions Answered:

1. How big is the global Gas-based Urea market?
2. What is the demand of the global Gas-based Urea market?
3. What is the year over year growth of the global Gas-based Urea market?
4. What is the production and production value of the global Gas-based Urea market?
5. Who are the key producers in the global Gas-based Urea market?
6. What are the growth factors driving the market demand?

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