

Global Granular Urea Fertilizer Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Granular Urea Fertilizer market size is expected to reach \$ 52852 million by 2032, rising at a market growth of 0.1% CAGR during the forecast period (2026-2032).

Granular urea fertilizer refers to urea nitrogen fertilizer processed into granules using a granulation process. Its main component is urea (Carbamide, chemical formula $\text{CO}(\text{NH}_2)_2$), with a nitrogen content typically around 46%. Compared to powdered urea, granular urea features uniform particle size, high strength, resistance to clumping, and good flowability, facilitating mechanized fertilization and long-distance transportation and storage. It is primarily used to provide crops with readily available nitrogen and is widely applied in rice, wheat, corn, and other cash crops, serving as either a base fertilizer or top dressing. Due to its ease of application, high utilization efficiency, and relatively low cost, granular urea fertilizer holds a dominant position in global agricultural production. In 2025, global consumption of granular urea fertilizer was estimated at approximately 160.16 million tons.

Granular urea fertilizer is a high-concentration nitrogen fertilizer product made primarily of urea, processed into granules using a granulation process. Its nitrogen content is typically around 46%. As one of the most widely used nitrogen fertilizers globally, granular urea occupies a core position in modern agricultural production systems due to its advantages such as uniform particle size, high strength, good flowability, and ease of mechanized application. It is widely used in the cultivation of rice, wheat, corn, cotton, and various cash crops, serving as a crucial foundational fertilizer for ensuring food security and increasing crop yields.

In recent years, global agricultural production has steadily expanded, with population growth and the demand for food security continuously driving stable growth in nitrogen

fertilizer consumption. Asia remains the world's largest consumer market for granular urea, with China and India holding significant shares in terms of planting area and fertilizer intensity. Latin America and Africa are experiencing increasing market demand potential as agricultural modernization accelerates. Developed countries, driven by precision agriculture and efficient fertilization technologies, are optimizing their fertilization structures, improving nitrogen use efficiency, and promoting product structure upgrades.

From the supply side, granular urea production uses natural gas or coal as the main raw material, and is completed through ammonia synthesis and urea granulation processes. Energy price fluctuations significantly impact production costs, causing granular urea prices to exhibit cyclical fluctuations. Major producing countries include China, India, Russia, and Middle Eastern and North African nations. These regions leverage their resource advantages to achieve large-scale production capacity and possess strong export capabilities. International trade patterns are heavily influenced by energy prices, geopolitical factors, and trade policy changes; global supply-demand mismatches and trade flows are significant factors contributing to price fluctuations.

In terms of product structure, ordinary granular urea remains the market mainstream, but the proportion of slow-release, controlled-release, and coated granular urea products is gradually increasing. With increasingly stringent environmental policies and higher requirements for sustainable agricultural development, high-efficiency utilization products are becoming the market upgrade direction. The promotion of mechanized fertilization and precision agriculture technologies has continuously optimized the morphology and particle quality of granular urea, improving application uniformity and nutrient utilization efficiency.

In terms of the industry chain, upstream suppliers include natural gas, coal, and synthetic ammonia raw material suppliers; midstream consists of urea producers; and downstream comprises agricultural growers, agricultural service companies, and distributor networks. The industry has a high degree of concentration, with large fertilizer companies possessing competitive advantages in scale and cost control. Regional differences in supply and demand, as well as seasonal fluctuations in demand, significantly impact market prices.

Looking ahead, the global granular urea fertilizer market will be driven by three main factors: continued growth in demand for food security; cost fluctuations due to energy price changes; and the promotion of green agriculture and efficient fertilization technologies. Overall market demand will remain robust, but price volatility will continue

to be a key characteristic of the industry.

This report studies the global Granular Urea Fertilizer production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Granular Urea Fertilizer total production and demand, 2021-2032, (Tons)

Global Granular Urea Fertilizer total production value, 2021-2032, (USD Million)

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

Global Granular Urea Fertilizer consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Granular Urea Fertilizer domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Granular Urea Fertilizer 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 Granular Urea Fertilizer 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 Granular Urea Fertilizer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Granular Urea Fertilizer Market, Segmentation by Type:

Coal-based Urea

Gas-based Urea

Global Granular Urea Fertilizer Market, Segmentation by Particle Size:

Small Particles

Large Particles

Global Granular Urea Fertilizer Market, Segmentation by Features:

Regular Urea Granules

Controlled-release Urea Granules

Stable Urea Granules

Global Granular Urea Fertilizer Market, Segmentation by Application:

Food Crops

Cash Crops

Horticultural and Fruit/Vegetable Crops

Pasture and Forage Crops

Companies Profiled:

Yara

CF Industries

QAFCO

SABIC

IFFCO

EuroChem

Pupuk Kaltim

OCI NV

KOCH

Acron

Notore Chemical

Profertil SA

CNPC

LuAn Chemical Technology

China Coal Energy Company

Henan Xinlianxin Fertilizer

Hubei Yihua Chemical

Hualu Hengsheng Chemical

Yuanxing Energy Company

Yunnan Yuntianhua

Huajin Chemical Industries

Lutianhua Group

Sichuan Meifeng Chemical Industry

Zhongneng Chemical

Shaanxi Coal and Chemical Industry

Ruixing Group

Shanxi Tianze Coal Chemical

Key Questions Answered:

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

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