

# Global Prilled Urea Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Prilled Urea market size is expected to reach \$ 59542 million by 2032, rising at a market growth of 0.1% CAGR during the forecast period (2026-2032).

Prilled urea refers to a solid granular nitrogen fertilizer product made by granulating molten urea. It is currently the most common form of urea product in agriculture and industry. Its main component is urea, with a nitrogen content of approximately 46%. The granules are regular in shape and of moderate strength, making them easy to store, transport, and apply mechanically. After being applied to the soil, primed urea gradually dissolves and transforms into nitrogen that crops can absorb under the action of water and urease. It is a fundamental nitrogen fertilizer raw material widely used in food crops, cash crops, and horticultural crops. In 2025, global primed urea production was approximately 160.15 million tons.

As one of the most mature and widely used product forms in the global nitrogen fertilizer system, urea granules occupy a core position in modern agricultural production and international fertilizer trade. Compared to powdered and liquid urea, urea granules, with their stable form, strong applicability, and high standardization, have become the mainstream product form in the global urea market and are also an important basic carrier for slow-release, controlled-release, and functionalized urea.

From a product attribute perspective, urea granules are solid granular nitrogen fertilizers made from molten urea through spraying or fluidized bed granulation processes. They are characterized by uniform particle size, high strength, and resistance to pulverization. This physical form not only significantly improves the product's stability during storage, transportation, and handling but also better adapts it to the needs of mechanized fertilization and large-scale agricultural production. For this reason, urea granules have long maintained the highest proportion in the global urea product structure and are the internationally accepted 'standard product.'

From the market demand side, the consumption of urea granules is highly correlated

with global food production. Given the stable planting area of food crops, the demand for urea granules exhibits strong inelastic characteristics. Meanwhile, with the improvement of agricultural mechanization and the shift from manual to mechanized and precise fertilization methods, the requirements for fertilizer physical properties are constantly increasing, further consolidating the dominant position of urea granules in the nitrogen fertilizer market. Furthermore, the widespread application of urea granules in the production of compound fertilizers, coated urea, and functional urea also provides continuous support for its demand.

From the supply-side structural perspective, urea granule production is characterized by large-scale and capital-intensive operations. Its production costs are highly correlated with the prices of upstream energy sources such as coal and natural gas, and different regions exhibit significant differentiation in cost and competitiveness due to differences in resource endowments. In recent years, against the backdrop of increasingly stringent environmental policies and higher energy efficiency requirements, outdated production capacity has been gradually phased out, while large-scale, high-efficiency plants have continued to be put into operation, driving the urea granule industry towards centralization and intensification, and continuously improving the overall operating efficiency of the industry.

At the product upgrade level, urea granules are evolving from a single basic fertilizer to a multifunctional carrier. Through coating, compounding, or surface modification technologies, urea granules are endowed with slow-release, controlled-release, or synergistic functions to meet the development needs of 'reducing fertilizer while increasing efficiency' and green agriculture. Compared to regular urea, these upgraded granular urea products offer significant advantages in nitrogen utilization, application frequency, and environmental friendliness, opening up new value growth opportunities for urea granules.

Regionally, Asia remains the core region for global urea granule production and consumption, with China wielding considerable influence in terms of production capacity, supply chain integrity, and export capabilities. The Middle East and Russia, relying on low-cost energy, occupy key positions in international urea granule trade. Global urea granule trade flows are significantly influenced by energy prices, policy regulations, and logistical conditions, leading to continuous adjustments in regional supply and demand relationships.

Looking ahead, the urea granule market will focus more on efficiency improvement, product upgrading, and sustainable development. In agriculture, granular urea will be deeply integrated with slow-release, controlled-release, and precision fertilization technologies; in industry, low-energy production processes and high-standard product quality will become key competitive advantages. Overall, urea granules are not a traditional 'mature product,' but rather a core nitrogen fertilizer form that continues to

release fundamental value and structural opportunities in the context of agricultural modernization and industrial upgrading.

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

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

### **Highlights and key features of the study**

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

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

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

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

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

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

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

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

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Prilled Urea Market, Segmentation by Type:

Small Particles

Large Particles

#### Global Prilled Urea Market, Segmentation by Process:

Regular Urea Granules

Controlled-release Urea Granules

Stable Urea Granules

#### Global Prilled Urea Market, Segmentation by Function:

Coal-based Urea

Gas-based Urea

## Global Prilled 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

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

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