

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

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## Abstracts

The global Urea market size is expected to reach \$ 79437 million by 2032, rising at a market growth of 0.1% CAGR during the forecast period (2026-2032).

Urea is a high-nitrogen organic chemical product with the chemical formula  $\text{CO}(\text{NH}_2)_2$ .

It typically appears as white granules or crystals and is one of the most widely used nitrogen fertilizers globally, containing approximately 46% nitrogen. Synthesized from synthetic ammonia and carbon dioxide under high temperature and pressure, urea is characterized by its high nutrient content, wide applicability to various crops, and ease of transportation and storage, making it widely used in agricultural fertilization.

Simultaneously, urea is also an important industrial raw material, used in the production of melamine, urea-formaldehyde resin, pharmaceutical intermediates, denitrification agents, and automotive urea, occupying a core position in the modern agricultural and chemical industry chain. Global urea production in 2025 was approximately 213.54 million tons, with prices fluctuating significantly due to the Russia-Ukraine war and downstream demand.

As one of the world's most widely used and industrialized nitrogen fertilizers, urea has always held an irreplaceable and fundamental position in ensuring food security, supporting stable and increased agricultural production, and serving the industrial system. Although its product form appears highly standardized, against the backdrop of changing energy structures, upgrading agricultural fertilization methods, and increasingly stringent environmental policies, the urea industry is undergoing a crucial transformation from 'scale-driven' to 'efficiency and structure-driven' growth, and its market value and development logic are being re-examined.

From a product attribute perspective, urea is both a core nitrogen fertilizer in agriculture and an important basic raw material for the chemical industry, with downstream applications in compound fertilizer production, diesel exhaust treatment (automotive urea), resins, adhesives, and many other fields. Agricultural urea still accounts for the

majority of global consumption, and its demand is closely related to crop planting area, crop structure, and fertilization regimes. As countries increasingly emphasize agricultural efficiency and environmentally friendly fertilization, the application of urea is gradually shifting from 'high-intensity, one-time input' to 'precision fertilization, efficiency first.'

From the supply side, the urea industry is characterized by its typical energy dependence, with its cost structure highly correlated with the prices of upstream energy sources such as coal and natural gas. Different regions exhibit significant differentiation in production routes, cost levels, and competitiveness due to variations in resource endowments. In recent years, with the gradual withdrawal of outdated production capacity and the commissioning of new, high-efficiency plants, the global urea industry's supply structure has continued to optimize, with increasingly evident trends towards large-scale, intensive, and integrated operations, and a steady increase in industry concentration.

On the demand side, the urea market is experiencing new growth differentiation. On the one hand, traditional agricultural urea demand is stabilizing, but driven by slow-release, controlled-release, and enhanced-efficiency urea, the added value per ton of product continues to rise. On the other hand, automotive urea (urea solution for SCR) is growing rapidly under the impetus of environmental regulations, becoming one of the most certain new demands in urea consumption. The parallel development of demand structures at both the agricultural and industrial ends gives the urea market strong long-term resilience.

From the perspective of technology and product upgrades, the urea industry is evolving from 'selling products' to 'selling solutions.' Through coating, compounding, and modification technologies, ordinary urea is endowed with additional functions such as slow-release, controlled-release, and soil-improving properties to meet the requirements of modern agriculture for fertilizer reduction, efficiency enhancement, and green production. Meanwhile, in the industrial sector, the increasing demands for urea purity, stability, and solubility have driven the continuous segmentation of product standards. Regionally, Asia remains the core region for global urea production and consumption, with China holding a significant position in terms of production capacity, supply chain integrity, and export capabilities. Resource-rich regions such as the Middle East and Russia, relying on low-cost energy, possess strong competitiveness in the international market. Global urea trade flows are significantly influenced by energy prices, policy regulations, and transportation costs, leading to continuous adjustments in the supply-demand balance between regions.

Looking ahead, the urea market will focus more on efficiency improvement, structural optimization, and sustainable development. In agriculture, high-efficiency fertilization and functional urea will gradually replace some traditional applications; in industry and

environmental protection, automotive urea and high-end chemical applications will provide new growth drivers. Overall, as a typical bulk basic chemical product, urea's market space has not shrunk, but is entering a new stage of value reshaping through product upgrades and application expansion.

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

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

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

Global Urea total production and demand, 2021-2032, (K MT)

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

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

Global Urea consumption by region & country, CAGR, 2021-2032 & (K MT)

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

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

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

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

This report profiles key players in the global 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 Urea market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 Urea Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Urea Market, Segmentation by Type:

Coal-based Urea

Gas-based Urea

Global Urea Market, Segmentation by Function:

Regular Urea

Controlled-release Urea

Specialty Urea

Global Urea Market, Segmentation by Form:

Solid

Solution

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

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