

Global Urea with Coal Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Urea with Coal market size is expected to reach \$ 27718 million by 2032, rising at a market growth of 0.1% CAGR during the forecast period (2026-2032). Coal-to-urea production refers to a urea production route that uses coal as the main raw material, producing syngas (mainly composed of carbon monoxide and hydrogen) through coal gasification, followed by chemical processes such as conversion, desulfurization, and ammonia synthesis, ultimately reacting with carbon dioxide to produce urea. This process does not rely on natural gas resources and is suitable for large-scale deployment in areas rich in coal resources. It is one of the important production methods in China's urea industry. Its characteristics include relatively stable raw material sources and a complete industrial chain, but its energy consumption and carbon emission levels are relatively high, requiring stringent environmental protection and energy efficiency management. In 2025, global production was approximately 74.73 million tons. Currently, coal-to-urea production is mainly concentrated in China. In the global urea industry, coal-to-urea, as a unique production route based on coal resources, has long played a vital supporting role in resource-rich countries and regions. Especially in market environments with relatively scarce natural gas resources and abundant coal reserves, coal-to-urea not only ensures the security of domestic nitrogen fertilizer supply but also serves as an important industrial link between energy, chemicals, and agriculture. Despite its energy consumption and environmental impact, coal-to-urea still occupies an indispensable strategic position in the global urea supply structure.

From a technological perspective, coal-to-urea is centered on coal gasification, converting coal into syngas, which is then reacted with carbon dioxide in an ammonia synthesis unit to produce urea, forming a complete integrated production chain. Compared to natural gas-based urea, the coal-based route has significant advantages in raw material acquisition and supply stability, making it particularly suitable for large-

scale deployment in countries and regions with concentrated coal resources and high energy self-sufficiency requirements. This characteristic determines the significant regional concentration of coal-to-urea in the global urea industry. From a market supply perspective, coal-to-urea production capacity is mainly concentrated in Asia, with China being the core producer of coal-to-urea globally. Leveraging its abundant coal resources and mature coal chemical industry system, China's coal-based urea accounts for a significant share of global urea supply, exerting a substantial influence on the international market's supply and demand balance. Meanwhile, some emerging economies are also exploring coal gasification-based urea production pathways to reduce dependence on imported natural gas and fertilizers and enhance their self-sufficiency in agricultural inputs.

In terms of cost structure, coal-based urea production is typically 'energy-driven,' with production costs highly dependent on coal prices, energy efficiency levels, and environmental protection investment. As environmental regulations become stricter and carbon emission reduction pressures increase, the cost advantage of traditional high-energy-consuming coal-based plants is gradually weakening, leading to significant differentiation within the industry: on the one hand, small and medium-sized plants with low energy efficiency and high emissions face pressure to exit the market; on the other hand, large-scale integrated projects employing advanced gasification technology and possessing waste heat recovery and comprehensive utilization capabilities for by-products still maintain strong long-term competitiveness.

From a product structure perspective, coal-based urea is primarily agricultural granular urea, a crucial source of basic fertilizer for ensuring food production. Meanwhile, with the upgrading of downstream demand, coal-based urea is gradually extending into areas such as industrial-grade urea and automotive urea raw materials, increasing added value through product diversification. This transformation means that coal-based urea is no longer just a 'low-cost alternative,' but is gradually integrating into a wider range of chemical and environmental applications.

From an industry trend perspective, coal-based urea is at a critical juncture of transformation and upgrading. On the one hand, global carbon emission reduction and energy consumption control policies continue to constrain the coal-based route; on the other hand, through technologies such as efficient coal gasification, clean production, and carbon dioxide recovery, coal-based urea still has room for optimization. Given the rigid demand in agriculture and the prominent demands for resource security, coal-based urea will not quickly disappear from the historical stage, but will enter a new phase of 'quality improvement and quantity reduction, and structural optimization.'

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

This report is a detailed and comprehensive analysis of the world market for Urea with

Coal 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 with Coal that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Urea with Coal 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 LuAn Chemical Technology, China Coal Energy Company, Henan Xinlianxin Fertilizer, Hubei Yihua Chemical, Hualu Hengsheng Chemical, Yuanxing Energy Company, Yunnan Yuntianhua, Huajin Chemical Industries, Zhongneng Chemical, Shaanxi Coal and Chemical Industry, 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 with Coal 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 Urea with Coal Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Urea with Coal Market, Segmentation by Type:

Small Particles

Large Particles

Global Urea with Coal Market, Segmentation by Raw Materials:

Urea Produced from Bituminous Coal

Urea Produced from Anthracite Coal

Global Urea with Coal Market, Segmentation by Function:

Regular Urea Granules

Controlled-release Urea Granules

Stable Urea Granules

Global Urea with Coal Market, Segmentation by Application:

Agriculture

Industrial

Companies Profiled:

LuAn Chemical Technology

China Coal Energy Company

Henan Xinlianxin Fertilizer

Hubei Yihua Chemical

Hualu Hengsheng Chemical

Yuanxing Energy Company

Yunnan Yuntianhua

Huajin Chemical Industries

Zhongneng Chemical

Shaanxi Coal and Chemical Industry

Ruixing Group

Shanxi Tianze Coal Chemical

Key Questions Answered:

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

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