

Global Coal-based Urea Market Growth 2026-2032

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Abstracts

The global Coal-based Urea market size is predicted to grow from US\$ 25911 million in 2025 to US\$ 26364 million in 2032; it is expected to grow at a CAGR of 0.1% from 2026 to 2032.

Coal-based 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 a relatively stable source of raw materials and a complete industrial chain, but its energy consumption and carbon emission levels are relatively high, requiring strict environmental protection and energy efficiency management. In 2025, global production was approximately 74.73 million tons, and currently, coal-based urea production is mainly concentrated in China.

In the global urea industry, coal-based 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-based 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-based urea still occupies an indispensable strategic position in the global urea supply structure.

From a technological perspective, coal-based 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-based urea in the global urea industry.

From a market supply perspective, coal-based urea production capacity is mainly concentrated in Asia, with China being the core producer of coal-based 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 exhibits typical 'energy-driven' characteristics, 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 basic fertilizer source 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.'

LP Information, Inc. (LPI) ' newest research report, the 'Coal-based Urea Industry Forecast' looks at past sales and reviews total world Coal-based Urea sales in 2025, providing a comprehensive analysis by region and market sector of projected Coal-based Urea sales for 2026 through 2032. With Coal-based Urea sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Coal-based Urea industry.

This Insight Report provides a comprehensive analysis of the global Coal-based Urea landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Coal-based Urea portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Coal-based Urea market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Coal-based Urea and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Coal-based Urea.

This report presents a comprehensive overview, market shares, and growth opportunities of Coal-based Urea market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Small Particles

Large Particles

Segmentation by Raw Materials:

Urea Produced from Bituminous Coal

Urea Produced from Anthracite Coal

Segmentation by Function:

Regular Urea Granules

Controlled-release Urea Granules

Stable Urea Granules

Segmentation by Application:

Agriculture

Industrial

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Coal-based Urea market?

What factors are driving Coal-based Urea market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Coal-based Urea market opportunities vary by end market size?

How does Coal-based Urea break out by Type, by Application?

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