

Global Gas-based Urea Market Growth 2026-2032

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Abstracts

The global Gas-based Urea market size is predicted to grow from US\$ 48266 million in 2025 to US\$ 49104 million in 2032; it is expected to grow at a CAGR of 0.1% from 2026 to 2032.

Gas-based urea refers to urea produced primarily from natural gas. 'Gas-based' means 'gas-sourced,' meaning the upstream process involves reforming natural gas steam to produce hydrogen, then separating the hydrogen from air to synthesize ammonia, and finally reacting carbon dioxide with ammonia to produce urea. Compared to coal-based urea, gas-based urea typically has lower energy consumption, relatively lower emissions, and higher product purity. Its production cost is highly correlated with natural gas prices, giving it a significant cost advantage in regions rich in natural gas resources, such as the Middle East, North America, and Russia. In global trade, gas-based urea is primarily used in the export market and is one of the important pricing bases for international urea prices. In 2025, global gas-based urea production was approximately 138.81 million tons.

Gas-based urea refers to urea produced primarily from natural gas. Its production process involves natural gas steam reforming to produce hydrogen, which is then used to synthesize ammonia and further converted into urea. Compared to coal-based urea, gas-based urea has significant advantages in energy consumption, carbon emissions, and product purity, making it a mainstream category in global export trade and a crucial benchmark for international urea prices. With global energy structure adjustments and cyclical fluctuations in natural gas prices, the gas-based urea market is exhibiting stronger cost sensitivity and regional differentiation.

In recent years, the global gas-based urea market has maintained a stable and fluctuating growth trend. The agricultural sector remains the core consumer, accounting for over 60%, primarily used for food and cash crop cultivation. In the industrial sector,

gas-based urea continues to grow in downstream applications such as melamine, urea-formaldehyde resin, and automotive urea solution (SCR denitrification systems). Due to the lower impurity content of gas-based products, they are more suitable for high-end industrial applications, resulting in relatively higher added value. In the coming years, driven by both global food security policies and increasingly stringent environmental regulations, the demand structure for gas-based urea will continue to optimize.

From an industry chain perspective, the core cost of gas-based urea production comes from natural gas prices. Natural gas accounts for approximately 60%-80% of production costs, therefore, fluctuations in international gas prices directly impact corporate profitability and global trade flows. The Middle East, North America, Russia, and some Central Asian countries have become major global supply bases due to their natural gas resource advantages. The Middle East, in particular, has a high export share and is a significant source of supply in the global spot market. The European market is heavily influenced by gas price fluctuations, resulting in cyclical changes in capacity utilization. Asia is primarily an import-dependent market, with India and Southeast Asia being key growth markets for demand.

In terms of the competitive landscape, the industry is dominated by resource-based companies. Companies with upstream natural gas resources or long-term low-price gas supply agreements possess significant cost advantages. Leading companies are continuously increasing their market share by expanding large-scale integrated ammonia-urea plants, optimizing energy efficiency, and strengthening international trade channels. Meanwhile, the development trends of low-carbon production technologies and blue ammonia and green ammonia will also have a profound impact on the future structure of the gas-based urea industry.

Looking ahead, the global gas-based urea market will face three key variables: first, international natural gas price trends; second, changes in global food demand and agricultural subsidy policies; and third, carbon emission policies and the progress of energy transition. Highly efficient and energy-saving equipment, large-scale integrated production, and regional resource advantages will become the core of corporate competitiveness.

LP Information, Inc. (LPI) ' newest research report, the "Gas-based Urea Industry Forecast" looks at past sales and reviews total world Gas-based Urea sales in 2025, providing a comprehensive analysis by region and market sector of projected Gas-based Urea sales for 2026 through 2032. With Gas-based Urea sales broken down by

region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Gas-based Urea industry.

This Insight Report provides a comprehensive analysis of the global Gas-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 Gas-based Urea portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Gas-based Urea market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Gas-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 Gas-based Urea.

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

Segmentation by Type:

Large Granule Urea

Small Granule Urea

Segmentation by Process:

Carbon Dioxide Stripping Method

Aqueous Solution Full Circulation Method

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.

Yara

CF Industries

QAFCO

SABIC

IFFCO

EuroChem

Pupuk Kaltim

OCI NV

KOCH

Acron

Notore Chemical

Profertil SA

CNPC

Lutianhua Group

Sichuan Meifeng Chemical Industry

Key Questions Addressed in this Report

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

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

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

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

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

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