

Global Prilled Urea Market Growth 2026-2032

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Abstracts

The global Prilled Urea market size is predicted to grow from US\$ 55633 million in 2025 to US\$ 56635 million in 2032; it is expected to grow at a CAGR of 0.1% from 2026 to 2032.

Prilled Urea is a solid urea product produced from ammonia and carbon dioxide and finished through a prilling process, in which concentrated molten urea is dispersed as droplets from the upper section of a prilling tower and solidified during counter-current contact with cooling air. The resulting product consists of relatively small, near-spherical, free-flowing particles. Fertilizer-grade Prilled Urea typically contains at least 46% nitrogen, while commercial specifications also control biuret, moisture and particle-size distribution; representative products require at least 90% of particles within approximately 1–2.8 mm. This study focuses on commercially supplied Prilled Urea used primarily as a nitrogen fertilizer, while also covering technical and industrial grades where the prilled physical form is relevant. Compared with Granular Urea, Prilled Urea generally has smaller particles and lower mechanical strength, but benefits from mature production technology, relatively simple finishing and rapid dissolution. The upstream ammonia may be produced through natural gas-based, coal-based or other synthesis routes, making feedstock economics, prilling efficiency, particle quality, regional logistics and end-use specifications central to market competitiveness.

Key Findings

Commercial Prilled Urea typically contains at least 46% nitrogen with most particles concentrated within approximately 1–2.8 mm

Prilling converts molten urea droplets into small spherical particles through counter-current cooling in a prilling tower

Agriculture remains the dominant application, supported by direct broadcasting, fertigation and established regional fertilizer distribution

Prilled Urea generally offers lower finishing complexity but lower mechanical strength than Granular Urea

Improved prilling technologies are increasing particle uniformity, impact strength and dust-control performance

Market Trends

The Prilled Urea market is evolving primarily through improvements in particle quality, energy efficiency and application differentiation rather than fundamental changes in product chemistry. Conventional prilling remains an established finishing route because of its mature technology and relatively straightforward conversion of concentrated urea melt into solid fertilizer. However, traditional prills can be more susceptible to breakage, dust formation and caking than mechanically stronger granular products, particularly when subjected to repeated handling and long-distance transportation. Technology development is therefore focused on narrowing this physical-performance gap. Modern seeding systems, improved droplet formation and vibro-prilling can increase impact strength, narrow particle-size distribution and reduce the formation of fine satellite droplets and dust. Stamicarbon's current technology development specifically targets these characteristics, demonstrating that prilling remains an actively optimized process rather than a static legacy technology. At the same time, producers are extending prilled products beyond conventional fertilizer grades into technical-grade and differentiated products. SABIC introduced prilled technical-grade urea as a new commercial offering in 2025, reflecting increasing demand for application-specific quality control. Upstream energy efficiency and lower-carbon ammonia production are also becoming increasingly relevant to the long-term competitiveness of Prilled Urea.

Market Dynamics

Drivers

Agricultural nitrogen demand is the principal driver of the Prilled Urea market. With nitrogen content typically around 46%, Prilled Urea provides a concentrated solid nutrient source that can be transported efficiently, stored in bulk or bags and applied across a wide range of crops. SABIC identifies broadcasting and fertigation as representative applications for prilled products, reflecting their compatibility with both

conventional field fertilization and irrigation-based nutrient delivery. The smaller particle size also supports relatively rapid dissolution, which is advantageous in selected agricultural systems. Demand is especially relevant in regions with mature prilling capacity, established fertilizer distribution networks and agricultural practices already adapted to smaller-particle urea. Broader nitrogen demand remains strongly concentrated in Asia: IFA estimates that East Asia accounted for approximately 31% and South Asia for around 24% of global nitrogen fertilizer use in 2025/26. Beyond agriculture, Prilled Urea can also serve resin, adhesive and chemical processing applications, while higher-purity technical-grade prills provide an additional channel into SCR-related and other specialized industrial markets.

Restraints

The most significant product-specific restraint is competition from Granular Urea in logistics-intensive fertilizer markets. Prilled particles are generally smaller and mechanically less resistant than large granules, increasing the potential for particle breakdown, dust formation and caking during repeated loading, unloading and extended storage. These characteristics can reduce attractiveness for large export-oriented supply chains in which fertilizer passes through several terminals and transportation stages before reaching the farm. The need to maintain product quality also places greater emphasis on humidity control, clean storage and careful handling; SABIC specifically notes that moisture exposure can lead to lump formation and dust and adversely affect spreading performance. Upstream economics create an additional constraint because Prilled Urea remains dependent on ammonia production and therefore on natural gas, coal and energy costs. Agricultural customers are highly price sensitive, limiting producers' ability to fully pass through sharp increases in feedstock costs. Environmental pressure associated with ammonia emissions, prilling-tower dust, upstream carbon intensity and nitrogen losses after field application also increases investment requirements and encourages more efficient fertilizer-use practices.

Opportunities

A major opportunity for Prilled Urea lies in upgrading existing prilling technology rather than replacing mature assets outright. Modern particle-strengthening and vibro-prilling technologies can improve droplet formation, increase mechanical resistance, reduce disintegration and narrow particle-size distribution, enabling producers to improve storage and handling performance while retaining the basic economic advantages of prilling. Stamicarbon's development of prill impact-strengthening and vibro-prilling systems illustrates the continuing technical potential of this route. Another opportunity is the development of higher-specification prilled products. Technical-grade Prilled Urea

can serve industrial chemistry and high-purity applications where impurity control, dissolution behavior and consistent quality are more important than the mechanical requirements associated with long-distance fertilizer trade. SABIC's introduction of prilled technical-grade urea demonstrates the commercialization of this differentiated segment. In agriculture, stabilized products, inhibitors and improved nutrient-management practices can enhance the agronomic value of conventional prills. Upstream improvements in urea synthesis energy consumption and lower-carbon ammonia can further reduce product carbon intensity, creating additional differentiation for producers serving sustainability-sensitive customers.

Challenges

The Prilled Urea industry must manage commodity-price volatility while simultaneously improving a product form that competes directly with mechanically stronger granular material. Global urea prices respond rapidly to natural gas and coal costs, fertilizer affordability, government trade policies and maritime disruptions, while producers have limited ability to differentiate standard fertilizer-grade chemistry. International supply is also exposed to geopolitical concentration: Iran, Qatar, Saudi Arabia, the UAE and Bahrain together accounted for approximately 34% of global urea trade in 2024, demonstrating the importance of Middle Eastern production and logistics to the broader urea market. At plant level, maintaining uniform particle size and adequate mechanical strength at high throughput remains technically important because poor prill strength can increase disintegration, fine-particle formation and caking during subsequent handling. Producers must therefore balance the cost advantage of established prilling assets against expenditure on dust management, tower upgrades, product conditioning and emissions reduction. Longer term, the industry also faces pressure to lower the carbon intensity of ammonia production without undermining the cost competitiveness required in a price-sensitive fertilizer market.

Industry Chain Analysis

The Prilled Urea industry chain begins with feedstock and energy used in ammonia production. Natural gas-based plants typically reform methane to generate hydrogen for ammonia synthesis, while coal-based systems use gasification to produce synthesis gas. Ammonia subsequently reacts with carbon dioxide to form urea solution, which is concentrated into molten urea before the finishing stage. Natural gas or coal cost, plant energy consumption, operating rate and integration between ammonia and urea units therefore determine much of the fundamental production-cost structure. Large integrated ammonia-urea complexes can benefit from continuous operation, heat

integration, carbon dioxide utilization and economies of scale.

The defining midstream process is prilling. Molten urea is distributed at the top of a prilling tower as droplets, which cool and solidify during descent through counter-current air to form spherical prills. QAFCO specifies its Prilled Urea as white, free-flowing material containing at least 46% nitrogen, with maximum biuret of 1%, maximum moisture of 0.5% and at least 90% of particles within the 1–2.8 mm range. Subsequent operations include cooling, screening, anti-caking treatment, storage, bagging or bulk loading and distribution. Downstream channels include fertilizer wholesalers, agricultural retailers, farms, compound-fertilizer manufacturers and selected industrial customers. Commodity-grade profitability depends primarily on feedstock cost and plant utilization, while particle strength, dust control, storage behavior, distribution efficiency and consistent specifications create additional value during finishing and downstream supply.

Segment Insights

The Prilled Urea market can be differentiated primarily by product grade and upstream feedstock route. Fertilizer-grade material constitutes the core commercial segment and is characterized by high nitrogen content, controlled moisture and biuret levels and relatively small particle size. Representative QAFCO specifications require at least 46% nitrogen and at least 90% of particles between 1 and 2.8 mm, while SABIC similarly specifies nitrogen content of at least 46% for its commercial prilled product. Technical-grade Prilled Urea represents a smaller but more differentiated segment in which purity, trace contaminants, additives and dissolution performance become increasingly important. Its development allows producers to access applications less dependent on conventional agricultural commodity pricing.

From the production-route perspective, natural gas-based and coal-based Prilled Urea have essentially the same final chemical composition but materially different cost structures. Natural gas-based production is prevalent in the Middle East, Russia and other gas-resource regions, whereas coal-based ammonia remains important in China. The former is particularly sensitive to natural gas pricing and availability, while the latter is more exposed to coal prices, electricity requirements, gasification efficiency and environmental costs. These structural differences affect regional utilization rates and cost competitiveness. Prilled versus granular positioning adds another layer of segmentation: prilled products are well suited to established regional fertilizer systems and selected direct-application markets, whereas granular products generally gain an advantage when long-distance bulk handling and repeated logistics are critical.

Downstream Market Opportunities

Agriculture remains the largest downstream opportunity for Prilled Urea. The product is suitable for direct broadcasting across a wide range of crops and can also be used in irrigation-based fertilization, giving it flexibility across different farming systems. Markets with established prilling capacity, local or regional fertilizer distribution and familiar small-particle application practices provide a particularly stable demand base. Opportunities within agriculture increasingly center on improved product performance and nitrogen-use efficiency. Higher particle uniformity, stronger prills and improved anti-caking treatment can reduce handling losses, while urease inhibitors, nitrogen stabilizers and better application timing can increase the effective utilization of nitrogen. Industrial and technical-grade applications provide a smaller but strategically valuable second opportunity. Prilled Urea can serve resin and chemical-processing markets, while high-purity technical prills can be used as feedstock for emissions-control solutions. SABIC's 2025 introduction of prilled technical-grade urea illustrates increasing commercial interest in this higher-specification segment. Producers capable of combining competitive ammonia economics with reliable particle quality and impurity control can therefore address both high-volume fertilizer demand and specialized industrial customers.

Regional Insights

Asia is a major production and consumption region for Prilled Urea, supported by large agricultural nitrogen demand, extensive urea capacity and a substantial installed base of traditional prilling technology. East Asia and South Asia together represented approximately 55% of global nitrogen fertilizer use in 2025/26, underlining the importance of Asian agricultural markets to overall urea consumption. China combines very large domestic fertilizer demand with an extensive coal-based ammonia and urea industry, while South and Southeast Asian markets consume both prilled and granular products depending on domestic capacity, import structure and local fertilizer practices. The continued operation of mature prilling towers and established distribution networks supports the long-term relevance of smaller-particle products in these markets.

The Middle East represents another important production base, supported by competitively priced natural gas and large integrated ammonia-urea complexes. QAFCO currently markets both prilled and granular urea, illustrating the coexistence of the two product forms within large export-oriented facilities. The region's broader strategic importance is substantial, with Iran, Qatar, Saudi Arabia, the UAE and Bahrain together accounting for about 34% of global urea trade in 2024. Russia and other gas-

rich producing regions also have favorable feedstock economics, while European production is more exposed to natural gas price volatility. For Prilled Urea specifically, regional competitiveness ultimately depends on the combination of upstream feedstock costs, existing prilling assets, local customer preferences and the relative logistics economics of smaller prills versus stronger granular products.

Competitive Landscape Analysis

Competition in Prilled Urea is primarily driven by feedstock cost, ammonia integration, existing prilling capacity, product quality and regional logistics rather than brand differentiation. Large integrated producers with mature prilling towers can maintain strong positions in domestic and regional fertilizer markets where small-particle products remain accepted and long-distance bulk handling is less critical. QAFCO and SABIC are among the international producers with officially disclosed Prilled Urea portfolios; both specify fertilizer-grade products containing at least 46% nitrogen, while SABIC has also extended its portfolio into prilled technical-grade urea. Competition with Granular Urea is an important structural factor because new export-oriented projects may prioritize granulation where mechanical strength, lower dust and repeated bulk handling are key purchasing requirements. Existing prilling producers can respond through improved droplet control, particle-strengthening technologies, dust reduction and anti-caking performance. The competitive landscape is therefore becoming increasingly segmented: conventional fertilizer-grade producers compete primarily on cost, reliable supply and regional distribution, while technically advanced suppliers can differentiate through improved physical quality, technical-grade specifications and lower-carbon production pathways.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Prilled 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 Prilled Urea

portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Prilled Urea market.

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

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

Market Segmentation

Segmentation by Type:

Coal-based Urea

Gas-based Urea

Segmentation by Process:

Conventional Urea

Modified Urea

Segmentation by Application:

Agriculture

Industrial

Automotive

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

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 Addressed in this Report

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

What factors are driving Prilled Urea market growth, globally and by region?

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

How do Prilled Urea market opportunities vary by end market size?

How does Prilled Urea break out by Type, by Application?

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