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Urea Market Forecasts to 2032 – Global Analysis By Product Type (Granular Urea, Prilled Urea and Other Product Types), Grade (Fertilizer Grade, Feed Grade and Technical Grade), Crop Type, Specialty Type, Technology, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Urea Market is accounted for $145.50 billion in 2025 and is expected to reach $194.07 billion by 2032 growing at a CAGR of 4.2% during the forecast period. Carbamide, another name for urea, is an organic compound that is rich in nitrogen and has the chemical formula CO (NH?)?. The global fertilizer industry relies heavily on it to improve soil fertility and increase agricultural output. Through the Haber-Bosch process, ammonia and carbon dioxide react at high temperatures and pressures to produce urea, a highly soluble substance. Urea is used extensively in agriculture, but it is also essential for industrial processes like making adhesives, resins, and medications. It also improves environmental sustainability by lowering nitrogen oxide emissions in automobile selective catalytic reduction (SCR) systems.

According to the International Fertilizer Association's Medium-Term Fertilizer Outlook 2024–2028, global urea production reached 195.5 million metric tons in 2023, marking a 6% increase compared to 2022.

Market Dynamics:

Driver:

Increasing fertilizer demand in agriculture

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Due to its high nitrogen content and affordability, urea is the most popular nitrogen-based fertilizer in the world. By 2050, it is anticipated that there will be 9.7 billion people on the planet, which will increase demand for food and strain agricultural output. High-yield farming methods, which use nitrogen fertilizers like urea to improve soil fertility and increase crop yields, are becoming more and more popular among farmers. Additionally, the use of sustainable agricultural methods and precision farming is promoting the controlled release of fertilizers, increasing productivity, and lowering nitrogen losses.

Restraint:

Price fluctuations for energy and raw materials

Natural gas and coal, the main raw materials for ammonia synthesis in the Haber-Bosch process, are crucial to the production of urea. The cost of producing urea is greatly impacted by changes in government policies, supply chain interruptions, and geopolitical tensions that cause fluctuations in global energy prices. Urea has become less affordable for end users as a result of fertilizer manufacturers being forced to reduce production or raise prices due to rising natural gas prices in North America and Europe. Furthermore, environmental regulations and the unpredictability of raw material supplies affect the production of urea from coal in China and India.

Opportunity:

Growth in green and bio-based urea production

Green urea from renewable sources is becoming more accessible as a result of the drive toward sustainability and carbon-neutral fertilizer production. Conventional urea production is a carbon-intensive process since it mainly depends on fossil fuels, especially coal and natural gas. Low-emission urea production is being made possible by developments in carbon capture, electrochemical nitrogen fixation, and green ammonia production. As a more environmentally friendly option to traditional techniques, a number of businesses are investing in hydrogen-based ammonia synthesis. Moreover, a new market niche is anticipated as a result of the increased demand for sustainable urea production brought about by regulatory bodies' stricter carbon pricing and emission reduction targets.

Threat:

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Challenges of sustainability and environmental regulations

The market for urea is seriously threatened by growing worries about the effects of nitrogen fertilizers on the environment. Overuse of urea-based fertilizers causes greenhouse gas emissions, especially nitrous oxide (N?O), which has a potential for global warming that is almost 300 times greater than that of CO?, as well as nitrogen leaching and groundwater contamination. Additionally, stricter laws governing fertilizer use, nitrate pollution, and ammonia emissions are being enforced globally, compelling producers and farmers to switch to sustainable substitutes like controlled-release formulations, organic fertilizers, and bio-fertilizers.

Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on the urea market, disrupting global supply chains while simultaneously driving demand fluctuations. The production and distribution of urea were impacted by labor shortages, transportation bottlenecks, and shortages of raw materials brought on by lockdowns and movement restrictions. Major urea-producing countries such as China, India, and Russia experienced logistical setbacks, and port congestion and export restrictions further hampered international trade. Consequently, the agricultural sector saw stable or rising demand for urea due to ongoing farming operations and government subsidies, while the industrial sector saw a decline in demand due to slowdowns in the chemical, automotive, and building sectors.

The Granular Urea segment is expected to be the largest during the forecast period

The Granular Urea segment is expected to account for the largest market share during the forecast period, mainly because of its increased nitrogen content, better handling qualities, and more stable storage. Because of its larger particle size, which prevents dust formation and guarantees even spreading, it is widely used in large-scale agriculture, particularly in broad-acre farming and mechanized fertilizer application. Granular urea is more effective for soil application because of its slow rate of dissolution, which reduces nitrogen loss and enhances crop uptake. Moreover, granular urea is also becoming more and more necessary in contemporary farming methods due to rising investments in precision agriculture and controlled-release fertilizers.

The Feed Grade segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Feed Grade segment is predicted to witness the highest

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growth rate, driven by its growing use in animal feed as a source of non-protein nitrogen (NPN). Its use in the dairy and livestock industries has been driven by the growing demand for high-protein diets and affordable animal nutrition solutions, especially in emerging economies where cattle farming is growing. Additionally, feed-grade urea is a desirable substitute for pricey protein sources like fish meal and soybean meal because it increases rumen microbial activity, which improves digestion and feed efficiency overall. Its market expansion is also being driven by the increased emphasis on sustainable livestock production, government assistance for the dairy industry, and rising meat consumption globally.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by a large population, a high level of agricultural activity, and robust government support for fertilizer use. Because of their vast agricultural sectors and rising food demand, nations like China, India, and Indonesia are significant consumers. While India mainly depends on imports to meet its agricultural needs, aided by government programs and fertilizer subsidies, China, the world's largest producer of urea, plays a significant role in both domestic consumption and international exports. Furthermore, the region's dominance is reinforced by the growing demand for industrial applications like chemicals, adhesives, and resins.

Region with highest CAGR:

Over the forecast period, the Middle East & Africa region is anticipated to exhibit the highest CAGR, driven by growing industrial applications, rising fertilizer demand, and rising agricultural investments. A vital raw material for urea synthesis, natural gas reserves are being used by nations like Saudi Arabia, the United Arab Emirates, and Egypt to quickly increase their urea production capacity. With the help of government programs and foreign investments in the agricultural sector, Africa's increased emphasis on food security and better farming practices is also speeding up the consumption of urea. Moreover, the region is becoming a major player in the global market as a result of its increasing exports to Asia and Europe.

Key players in the market

Some of the key players in Urea market include CF Industries Holdings, Inc., Qatar Fertilizer Company, Yara International ASA, SABIC, OCI N.V, EuroChem Group, Acron Group, Gujarat State Fertilizers & Chemicals Ltd, Chambal Fertilizers & Chemicals Ltd,

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Koch Fertilizer LLC, Nutrien AG, BASF SE, Indian Farmers Fertiliser Cooperative Ltd, Mangalore Chemicals & Fertilizers Ltd and Coromandel International Limited.

Key Developments:

In September 2024, SABIC has announced a significant move in its strategic realignment with the signing of an agreement to sell its 20.62% stake in Aluminum Bahrain (Alba) to Saudi Arabian Mining Company (Ma'aden). The transaction, which is valued between BHD 363 million and BHD 398 million (equivalent to SAR 3,624 million to SAR 3,974 million), is set to proceed pending regulatory approvals from authorities in both Saudi Arabia and Bahrain.

In July 2024, Yara and Atome sign Heads of Terms for offtake from Atome’s renewable CAN project in Villeta, Paraguay. The deal between Atome and Yara covers the long-term supply of all of the Calcium Ammonium Nitrate (CAN) from Atome’s renewable production facility in Villeta, Paraguay. The 145 MW fertilizer project will produce and export fertilizers derived from baseload renewable power from 2027.

In May 2024, EuroChem has signed an agreement with China National Chemical Engineering Co. (CNCEC) for the design, construction and commissioning of a chemical complex in Janatas, Jambyl Region, Kazakhstan. CNCEC is a global provider of industrial engineering technologies with 70 years of experience in constructing petrochemical facilities.

Product Types Covered:

- Granular Urea
- Prilled Urea
- Other Product Types

Grades Covered:

- Fertilizer Grade
- Feed Grade

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Technical Grade

Crop Types Covered:

Field Crops

Horticultural Crops

Turf and Ornamental Crops

Specialty Types Covered:

Controlled Release Fertilizers (CRFs)

Slow Release Fertilizers (SRFs)

Water-Soluble Fertilizers

Liquid Fertilizers

Technologies Covered:

Stamicarbon

Saipem

Casale

Niik

Other Technologies

Applications Covered:

Nitrogenous Fertilizer

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- Melamine
- Cattle Feed
- Resin
- Other Applications

End Users Covered:

- Agriculture
- Animal Feed
- Chemical Synthesis
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy

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- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar

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South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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