

Urea - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Urea Market size is estimated at 76.95 billion USD in 2025, and is expected to reach 107.8 billion USD by 2030, growing at a CAGR of 6.98% during the forecast period (2025-2030).

Due to higher areas under turf and ornamentals, North America dominating the market

- Field crops, on average, require more nitrogen than other crop types. Field crop cultivation dominates the global agricultural landscape, accounting for more than 95.0% of all agricultural land. Rice, wheat, and corn are the world's most important field crops, accounting for about 38.0% of total agricultural land. Field crops dominate the global urea market, accounting for about 79.3% of the market value, amounting to around USD 60.1 billion in 2022. In countries like Canada, 32% of the field crop growers use urea fertilizers in their field crop cultivation.
- Horticultural crops accounted for about 19.6% of the total market value of urea fertilizers, amounting to around USD 14.8 billion in 2022. There is an increasing demand for fruits and vegetables around the world, particularly after the pandemic. Asia-Pacific dominates the urea fertilizer market for horticultural crops, primarily due to the extensive cultivation of horticultural crops in the region.
- North America dominates the urea fertilizer market in turf and ornamental crops. Turf and ornamental crops accounted for about 54.5% of the total market value, amounting to around USD 455.1 million in 2022. The presence of a large number of golf courses, sports clubs, and private lawn areas contributes to the region's dominance by share. Turf grass, for example, covers about 15.0 million hectares of land in the United States, which includes all stadiums, lawns, and parks.
- In terms of field and horticultural crops, Asia-Pacific is anticipated to grow at a faster rate due to the large availability of agricultural land. The turf and the ornamental segment is growing in the North American and European regions.

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Growing area under cultivation and reducing nitrogen use levels in the soils drives the market growth

- The global urea fertilizers market was valued at USD 75.77 billion in the year 2022, recording a volume consumption of 140.3 million metric tons. It is estimated to register a CAGR of 6.6% during 2023-2030. With the increase in population, developments in the agriculture industries are taking place regionally, increasing consumption and thereby driving the market.
- By country, India and China accounted for 32.8% and 28.3% of the Asia-Pacific Urea fertilizer market in 2022. Consumption growth is mainly driven by the demand for urea as a direct application fertilizer, accounting for more than 90% of the total urea consumption in these countries. Hence, the urea market in these regions is anticipated to grow significantly during 2023-2030.
- North America accounted for 11.6% of the total global urea market. The consumption of urea in 2022 was 20.9 million metric tons, which increased from 17.7 million metric tons in 2017. The increase in the area under cultivation resulted in an increase in the consumption of urea, and the cultivation increased from 228.0 million hectares in 2017 to 232.1 million hectares in 2022. This trend was observed due to the higher usage of fertilizers to increase the yield and productivity of the crop in the available land area.
- Based on the aforementioned factors and the need for enhanced productivity to feed the increasing population, the demand for urea is expected to increase, thereby boosting the market significantly during 2023-2030 with an anticipated volume CAGR of 3.3%.

Global Urea Market Trends

The rising pressure on the agriculture industry to meet the growing demand for food is expected to increase the area under field crop cultivation

- The global agricultural sector is facing many challenges. According to the UN, the world population may exceed 9 billion by 2050. This population growth may overburden the agricultural industry, which is already experiencing an output loss due to a lack of laborers and the shrinkage of agricultural fields caused by rising urbanization. According to the Food and Agriculture Organization, 70% of the global population is expected to live in cities by 2050. Due to the global loss of arable land, farmers now need to utilize more fertilizers to increase crop yields.
- Asia-Pacific is the world's largest producer of agricultural products. Agriculture is critical to the region's economy, as it employs about 20% of the total available workforce. Field crop cultivation dominates the region, accounting for about more than 95% of the total crop area in the region. Rice, wheat, and corn are the major field crops produced in the region, together accounting for about 24.3% of the total crop area in 2022.
- North America ranks as the second-largest arable region globally. Its farms cultivate a diverse range of crops, with a focus on field crops. Notably, corn, cotton, rice, soybean, and wheat are the prominent field crops, as highlighted by the USDA. In 2022, the United States commanded 46.2% of North America's crop cultivation area. However, the country witnessed a significant drop in crop acreage between 2017 and 2019, primarily due to adverse environmental conditions, leading to severe flooding in regions like Texas and Houston.

Nitrogen is the most widely used primary nutrient fertilizer in field crops, accounting for 45.5% of the total consumption

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- Corn/maize, rapeseed/canola, cotton, sorghum, rice, wheat, and soybean are some of the major primary nutrient-consuming crops worldwide. The primary nutrient application rates of these field crops were 230.57 kg/ha, 255.75 kg/ha, 172.70 kg/ha, 158.46 kg/ha, 154.49 kg/ha, 135.35 kg/ha, and 120.97 kg/ha, respectively. Primary nutrient fertilizers are highly crucial for crops because they play an essential role in plant metabolic processes and assist in forming tissues such as cells, cell membranes, and chlorophyll. Phosphorus is essential for growing high-quality crops; potassium activates the enzymes needed for plant growth and development.
- The global average application rate of nitrogen, potassium, and phosphorus in field crops is 164.31 kg/ha. Nitrogen is the most widely used primary nutrient fertilizer in field crops, accounting for an application rate of 224.6 kg/hectare, followed by potassic fertilizers with 150.3 kg/hectare and phosphorus with 117.9 kg/hectare in 2022.
- In 2022, the nitrogen application rate was highest in rapeseed, which was 347.4 kg/hectare. Similarly, the phosphorus application rate was highest in corn, which was 156.3 kg/hectare, and the potassium application rate was highest in canola, which was 248.6 kg/hectare.
- Global field crop cultivation area is increasing, particularly in South America and Asia-Pacific. These are the potential growing markets for fertilizers. Due to their efficiency, specialty fertilizers are widely used in developed regions such as Europe, North America, and other regions with widespread nutrient deficiencies. These factors are anticipated to drive the primary nutrient fertilizers market during 2023-2030.

Urea Industry Overview

The Urea Market is fragmented, with the top five companies occupying 20.78%. The major players in this market are CF Industries Holdings, Inc., Nutrien Ltd., OCI NV, SABIC Agri-Nutrients Co. and Yara International ASA (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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