

## **Urea Market Size, Share and Growth Analysis Report - Forecast Trends and Outlook (2025-2034)**

Market Report | 2025-08-13 | 151 pages | EMR Inc.

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### **Report description:**

The global urea market reached a volume of 177.21 MMT in 2024 . It is expected to grow at a CAGR of 0.90% between 2025 and 2034 driven by the growing demand as a fertiliser from the agriculture sector. The market is expected to reach a volume of 193.82 MMT in 2034 .

#### Urea Market Growth

Urea has been widely used as a fertiliser in the agricultural sector to provide plants with nitrogen to promote their growth, among its other applications. Due to its high nitrogen content and enhanced convenience of applications, storage, handling, and transportation, the use of urea over other nitrogen fertilisers has increased, which aids global urea market size.

Further, the rising consumption of meat and dairy products for high protein diets has surged the utilisation of feed grade urea, which ensures healthy growth and improved milk production and reproduction in animals, and aids in lowering feeding costs.

Figure: Fertiliser Production by Nutrient, 2020

#### Key Trends and Recent Developments

Expanding agriculture sector; increasing use of feed grade urea; applications of urea in the automotive sector; and growing use in urea-formaldehyde resin production are the key trends impacting the market share of urea.

Feb 20, 2024

Helwan, an Egyptian Urea producer announced the signing of an agreement with SML-INNO UK to produce 130,000 t/yr of black

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urea.

Jun 7, 2022

PT Pupuk Kalimantan Timur announced its plans to build a factory producing urea, methanol, and ammonia in West Papua's Bintuni Bay by investing about USD 2 billion. Through the new factory, the company aimed to expand its operations, fuel urea market demand, and bolster the economic growth of Indonesia.

Sep 1, 2022

QatarEnergy Renewable Solutions and Qatar Fertiliser Company (QAFCO), the affiliates of Qatar Energy, signed an agreement to construct the world's largest blue ammonia facility in Mesaieed Industrial City in Qatar.

Increasing demand for nitrogen fertilisers and the growing agriculture sector

As per urea market dynamics and trends, the rapidly growing agriculture sector is driving the demand for urea as one of the most essential nitrogenous fertilisers used in agricultural practices.

Rising use of feed grade urea

The consumption of meat and dairy products is increasing worldwide due to their high protein content. This boosts the incorporation of feed-grade urea in the diet of cattle and other ruminants as it promotes healthy growth, milk production, and reproduction.

Applications of urea in the automotive sector

The adoption of urea in the automotive sector is experiencing an increase, as the most basic function of the automotive urea solution is to transform the nitrogen oxides in automobile exhaust into harmless nitrogen and water, thereby saving energy, protecting the environment and aiding urea demand.

Application of urea in urea-formaldehyde resin production

A crucial industrial use of urea is in the production of urea-formaldehyde (UF) resins and glues. In the European Union, UF resins are majorly used in the construction sector to produce building materials, including particle boards and plywood.

Urea Industry Trends

In APAC countries like India, urea is subsidised for agricultural purposes. The government provides subsidies to fertiliser producers depending on the cost of production at each plant, and the manufacturers are required to sell the fertilisers at the maximum retail price (MRP) determined by the government.

As per the urea market analysis, the government has funded grants in the USA to boost fertiliser production to address price hikes caused by the Russia-Ukraine war, spur competition, and ensure food security. Further, in the Canadian Saskatchewan province, the government is committed to developing a competitive business environment with a suite of incentives to support the agricultural market and address high fertiliser prices.

A significant percentage of the population in developing countries depend on agriculture for their livelihood. Favourable

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agricultural policies in developing and developed countries globally, such as the Atmanirbhar Bharat Abhiyan in India, the U.S. Agricultural Policy in the USA, and the Swiss Agricultural Policy in Switzerland, have encouraged the growth of the agricultural market. Additionally, the growing population is increasing the demand for food and the need for food security.

## Industry Outlook

The urea market is driven by the increasing use of urea-based fertilizers in agriculture to boost crop yields and its growing application in industrial sectors like chemical manufacturing and automotive industries.

Global fertilizer production exhibited notable trends over the years across various nutrient types. Potassium fertilizer production increased from 35.02 million tonnes in 2010 to 46.6 million tonnes in 2021, as reported by "Our World in Data". This increase was driven by the growing demand for high-yield crops and the expansion of agricultural activities worldwide. As per the urea industry analysis, despite some volatility, including a 6.8% decline in 2019, potassium production rebounded with a 5.0% growth in 2020 and continued to rise by 3.8% in 2021.

Nitrogen fertilizer production grew from 107.36 million tonnes in 2010 to 118.5 million tonnes in 2021, which boosted urea industry revenue. However, production faced challenges, including a slight decline of 1.7% in 2021 due to factors such as fluctuating natural gas prices, which are a critical input for nitrogen fertilizer production, and environmental regulations affecting production capacities.

Phosphate fertilizer production remained relatively stable but showed a gradual increase from 44.09 million tonnes in 2010 to 48.2 million tonnes in 2021, according to the International Fertilizer Industry Association (IFA). The rise in production was influenced by the increasing need for phosphate fertilizers to support root development and crop maturity, essential for improving agricultural output.

Overall, total fertilizer production increased from 186.47 million tonnes in 2010 to 213.3 million tonnes in 2021. This growth underscores the ongoing global demand for fertilizers to boost agricultural productivity and ensure food security. Despite minor fluctuations, such as a slight dip in overall growth in 2020, the fertilizer market demonstrated resilience and a capacity to recover.

These trends highlight the importance of consistent fertilizer production in supporting the growth of the urea industry. The steady increase in nitrogen fertilizer production, despite occasional challenges, indicates a resilient demand for urea, driven by its vital role in enhancing agricultural productivity.

According to the International Fertilizer Association, Urea production and trade data from 2018 to 2023 show notable trends. In 2018, urea production was 171.6 million tonnes (Mt), increasing to 176.6 Mt in 2019, a 2.9% year-on-year (YoY) growth. By 2020, production reached 181.2 Mt, reflecting a 2.6% YoY increase. Production slightly dipped to 179.6 Mt in 2021, a 0.9% decline, likely due to market fluctuations. In 2022, production rose to 183.6 Mt, a 2.2% increase, driven by heightened agricultural demand.

Trade data in the urea industry also indicate significant changes. In 2018, trade was 48.3 Mt, increasing slightly to 48.6 Mt in 2019. By 2020, trade had surged to 52.1 Mt, a notable 7.1% YoY increase. In 2021, trade remained relatively stable at 52.3 Mt, with a minimal 0.4% YoY growth. Trade increased to 53.3 Mt in 2022, a 1.9% rise, but decreased to 51.2 Mt in 2023, reflecting a 3.9% decline, potentially due to changes in global market dynamics and supply chain issues.

The consistent rise in urea production is mainly driven by the growing use of urea-based fertilizers in agriculture and expanding industrial applications, while trade variations reflect market adjustments and logistical challenges.

## Urea Industry Analysis

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### What Factors are Strengthening the Growth of the Global Market of Urea?

- Increasing Agricultural Demand: Rising need for higher crop yields drives demand for urea-based fertilizers.
- Industrial Applications: Expanding use in producing plastics, resins, and adhesives aids urea demand forecast.
- Government Support and Subsidies: Subsidies and support for fertilizer use in agriculture boost market growth.
- Technological Advancements: Innovations in production processes and fertilizer formulations increase efficiency and reduce costs.

### What Challenges are Impacting the Global Market?

- Fluctuating Raw Material Prices: Volatility in raw materials prices affecting production costs.
- Supply Chain Disruptions: Challenges in logistics and transportation can lead to delays and increased costs, negatively impacting urea demand growth.
- Market Competition: Rising competition from other urea producers and alternative fertilisers.

### What are the Key Trends Shaping the Global Market of Urea?

- Sustainable Agriculture Practices: Eco-friendly farming practices are driving the demand for efficient urea fertilizers.
- Technological Innovations: Advances in urea production technology, such as more efficient manufacturing processes, are enhancing production capacity, reducing costs and offering lucrative urea market opportunities.
- Regional Production Shifts: Changes in production regions to areas with reduced raw material expenses and favourable regulatory conditions.

### Competitive Factors in the Global Market

Competitive factors in the global urea market include production capacity, cost efficiency, and technological advancements. Leading producers such as China and India dominate with high production volumes, with China alone producing over 50 million tonnes annually. Cost-efficient production methods and economies of scale provide a competitive edge.

### Key Demand Indicators in the Global Market

- Chemical Manufacturing Growth: Rising production of resins, plastics, and adhesives fuels urea consumption.
- Biofuel Production: The growing biofuel industry utilizes urea in the production process which increases urea market revenue.
- Global Food Security Initiatives: Government and international programs to ensure food security boost fertilizer use.

### Key Price Indicators in the Global Market

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- Raw Material Costs: Fluctuations in natural gas prices significantly impact urea production costs.
- Supply and Demand Dynamics: Changes in agricultural and industrial demand influence urea pricing.
- Geopolitical Factors: Trade policies and geopolitical stability affect market prices.
- Transportation and Logistics: Costs associated with shipping and logistics contribute to overall urea pricing and is a crucial trend in urea market.

#### Key Players in the Global Market of Urea and their Strategic Initiatives

- Yara International: Focuses on expanding production capacity and improving distribution networks, alongside investing in sustainable and environmentally friendly production technologies.
- CF Industries Holdings Inc.: Engages in strategic mergers and acquisitions to increase demand of urea market and diversify product offerings, along with optimizing production processes for cost efficiency.
- OCI Nitrogen: Pursues joint ventures and partnerships to expand geographical reach and product portfolio, while focusing on innovation in fertilizer formulations.
- EuroChem Group AG: Invests in research and development to create advanced fertilizer products and sustainable agricultural solutions, aiming for global market expansion.

#### Urea Industry Segmentation

"Global Urea Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

##### Market Breakup by Application

- Fertiliser
- Urea Formaldehyde (UF) and Melamine Resins
- Melamine (Cyanurates)
- Animal Feed
- Others

##### Market Breakup by Region

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

#### Urea Market Share

Based on application, fertiliser dominates the global market, supported by the growing demand for nitrogen rich fertilisers to boost crop production

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Urea is considered an ideal nitrogen fertiliser owing to its high nitrogen content (approximately 46%) and low transportation and storage costs. A combination of nitrogen-rich urea-starch composites and melamine supports the development of controlled-release fertilisers that reduce nutrient losses due to run-off and leaching and aid urea market expansion.

The fertiliser segment is closely followed by animal feed applications of urea. Feed grade urea is a widely used source of non-protein nitrogen (NPN) for animals and enhances the profitability of livestock farmers by reducing feeding costs.

#### Competitive Landscape

The market players offer high-quality urea at a competitive price to meet the growing global demand, especially from the agricultural sector.

#### Yara International ASA

Yara International ASA, headquartered in Norway, is the world's leading crop nutrition company and a provider of environmental and agricultural solutions.

#### Indian Farmers Fertilisers Cooperative Limited

IFFCO is one of India's biggest co-operative societies for urea industry which is wholly owned by Indian Co-operatives and has its production units in Kalol, Kandla, Phulpur, Aonla, and Paradeep. The company operates in multiple segments including fertiliser production to general insurance.

#### PT Pupuk Kalimantan Timur

PT Pupuk Kalimantan Timur (PKT), headquartered in Indonesia is one of the leading urea and NPK fertilizer producers in Asia and sells its products in domestic as well as foreign market. The company has an annual production capacity of 3.4 million tons of urea and 350 thousand tons of NPK.

#### Qatar Fertilizer Company

QAFCO is a global leader in fertiliser production and runs as a joint venture between the Government of Qatar and several foreign shareholders. QAFCO has a strong presence with 6 world-class plants, having an annual capacity of 3.8 MMT of ammonia and 5.6 MMT of urea.

Other notable players operating in the global urea market are National Fertilizers Limited, EuroChem Group AG, Saudi Arabian Fertilizer Company, CF Industries Holdings, Inc, and Nutrien Ltd, among others.

#### Urea Market Regional Analysis

There is a significant amount of intra-regional trade within the Asia Pacific region. Indonesia, with its substantial natural gas reserves, is one of the major ammonia and urea exporters in the Asia Pacific. The Asia Pacific region is also a major contributor to the global agriculture production, with countries such as India being the agriculture powerhouse and a leading producer of milk, pulses, and spices along with the world's largest area under wheat, rice, and cotton. This supports the urea market development, with urea being one of the most important nitrogenous fertilisers required during agricultural processes.

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Meanwhile, within North America, beef consumption has increased in the USA, owing to its affordability compared to vegan alternatives. With people getting comfortable preparing beef barbeques and briskets, the need to boost meat production has increased. Feed-grade urea finds applications to help stem weight loss in cattle by improving their rumen function.

More Insights On

Australia Urea Market

Argentina Urea Market

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