

The affected capacity, plant by plant

Since the first analysis in early May, the urea capacity caught up in the shock has eased from 35.9 to 29.7 million tonnes a year. Almost all of that fall is a single line — India’s March cut, which proved far smaller than the early annualised estimate and has since recovered. The core outage, Iran and Qatar at around 13 Mt a year, has not moved. Every affected plant is set out below, once each, with what it makes, what happened and when.

13.9		3.0	12.8	35.9 Mt
The coloured bar is the capacity affected now — 29.7 Mt across offline, production cuts and at risk. The full length is the first analysis on 7 May — 35.9 Mt . The 6.2 Mt difference is almost all India, below.				
		FIRST ANALYSIS Mt/yr	NOW Mt/yr	
Offline				13.9 Mt now
Plant-level capacity knocked out. Iran and Qatar are the core and still down; Bahrain has since come back.				
IRAN		6.5-8.9	6.5-8.9	Offline
Mahshahr / Bandar Imam petrochemical zone				
The zone (Fajr, Karun, Razi, Bandar Imam) was struck in early April. Offline since 4 Apr 2026; reporting points to a roughly two-year rebuild.				
QATAR		5.6	5.6	Offline
Qatar Fertiliser Co (QAFCO), Mesaieed				
Six ammonia-urea trains idled after QatarEnergy halted gas following the 2 Mar strike. Offline since 4 Mar 2026; no restart confirmed.				
BAHRAIN		—	0.6	Back online
GPIC (Sitra)				
Identified after the first analysis. Struck on 5 Apr 2026 and repaired by mid-May; kept in the offline band to capture the roughly six-week outage.				
Production cuts				3.0 Mt now
Plants idled or throttled by diverted gas — reduced output rather than a total loss.				
BANGLADESH		2.0-2.2	2.0-2.2	Idled
BCIC plants (five of six)				
Government suspended gas to the urea plants; five of six shut from 5 Mar 2026.				
PAKISTAN		0.43-0.47	0.43-0.47	Idled
Agritech Limited (AGL)				
RLNG cut under a force-majeure declaration; offline since 4 Mar 2026, confirmed in a stock-exchange filing.				
INDIA		≈7.2	0.3-0.6	Recovered
March curtailment (Chambal, Kribhco, GNFC)				
The first analysis annualised India’s cut of about a quarter in March. The shortfall that actually landed was far smaller, and output was back to normal by mid-April.				
At risk				12.8 Mt now
Still producing — exposed to the same gas and shipping disruption, but not a loss.				
EGYPT		7.2-7.3	7.2-7.3	Producing
MOPCO, Abu Qir (AFC), AlexFert and others				
Running on spot LNG cargoes; production rates reported unchanged.				
SAUDI ARABIA		2.6	2.6	Producing
SABIC Agri-Nutrients (SAFCO)				
Counted as offline in the first analysis after the early-April Jubail reports; since confirmed loading urea at Yanbu, so reclassified to producing.				
OMAN		1.85	1.85	Producing
OMIFCO (Sur)				
Producing normally; the exposure is on the export side, via the disrupted Strait of Hormuz.				
PAKISTAN		1.13	1.13	At risk
Other RLNG-network plants				
78 mmcf/d of LNG to the fertiliser sector suspended; exposed but not formally offline.				
Total urea capacity affected		35.9	29.7	
of about 240 Mt of global capacity		34.1-37.8	28.2-31.3	

Iran and Qatar — about 13 Mt a year — remain offline, and that loss is locked in. The move from 35.9 to 29.7 Mt is India’s cut easing back, not the core recovering.

Figures are urea capacity in million tonnes a year, and ranges show the low-high across estimates. They are the rated capacity of the plants affected — except where a cut has since recovered, in which case the figure is the shortfall that actually occurred. The first analysis is dated 7 May 2026, the current position late June.

Plants are grouped by their status now. Two have changed category since the first analysis — SABIC (offline → at risk, now producing) and Bahrain’s GPIC (added later; back online, but kept in the offline band to capture its outage) — so the first-analysis column reconciles to 35.9 Mt overall.

Beyond the Gulf — Europe’s gas-exposed capacity

SEPARATE · NOT IN THE TOTAL ABOVE

A different kind of risk from the Gulf: Europe’s exposure is **economic** — gas prices — not physical outage or blocked shipping. Through 2026 its plants **largely kept producing**, so the realised loss was small and is not yet quantified.

Europe makes about **14 Mt/yr** of ammonia (2024) — some **24.6 Mt** urea-equivalent — of which up to **~17 Mt** (about 70% of capacity, on the 2022 precedent) could curtail in a severe gas spike, roughly **3× SSA’s annual nitrogen use, expressed as urea-equivalent**. It is tracked separately, outside the 29.7 Mt total above, and would be sized off plant-level data if it materialised.

Sources: IndexBox / Eurostat (production); European Commission / Fertilizers Europe (2022 precedent); CRU and S&P Global (2026 status).