

Struvite Fertilizers Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Fertilizers, Crop Nutrition & Soil Health (Agriculture & Agribusiness)
> **Source:** https://www.mordorintelligence.com/industry-reports/struvite-fertilizers-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 650 million
Projected Forecast (2031)	USD 650 million
Growth Rate (CAGR)	7.80 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Struvite Fertilizers industry] (images/chart_2.png)

! [Struvite Fertilizers Market Size] (images/chart_3.png)

! [Struvite Fertilizers Market Share by Product Type, 2025] (images/chart_4.png)

! [Struvite Fertilizers Market Share by Crop Type, 2025] (images/chart_5.png)

! [Struvite Fertilizers Market Growth Rate by Region] (images/chart_6.png)

! [Struvite Fertilizers Market Concentration] (images/chart_7.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period	2021 - 2031
Market Size (2026)	USD 650 Million
Market Size (2031)	USD 940 Million
Growth Rate (2026 - 2031)	7.80 %
Fastest Growing Market	Asia-Pacific
Largest Market	North America
Market Concentration	Medium

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Market Overview

Struvite Fertilizers Market Analysis by Mordor IntelligenceThe Struvite Fertilizers Market size was valued at USD 600 million in 2025 and is estimated to grow from USD 650 million in 2026 to reach USD 940 million by 2031, at a CAGR of 7.80% during the forecast period (2026-2031). The struvite fertilizers market is benefiting from a steady shift in phosphorus sourcing as wastewater utilities and fertilizer buyers seek alternatives to mined phosphate. Supply concentration among a small group of phosphate-producing countries is keeping import-dependent regions focused on securing recovered nutrients. Struvite, which is magnesium ammonium phosphate recovered from wastewater streams, is gaining support due to its slow-release nutrient profile and a more controlled supply route compared to mined rock phosphate. The market is also attracting buyers seeking products aligned with circular-economy goals, low runoff, and clearer traceability. Regulatory support in Europe and parts of Asia, along with growing farmer interest in lower-carbon inputs, is keeping the struvite fertilizers market on a firm growth path through 2031.

Key Report Takeaways

- * By product type, granular struvite accounted for 45.2% of the struvite fertilizers market size in 2025, while liquid struvite is forecast to expand at an 8.8% CAGR through 2031.
- * By application, agriculture accounted for 38.5% of the struvite fertilizers market share in 2025, while horticulture recorded the highest projected CAGR of 8.6% through 2031.
- * By crop type, cereals and grains led with a 35.4% share in 2025, while fruits and vegetables are projected to advance at an 8.1% CAGR through 2031.
- * By geography, North America led with 35.8% share in 2025, while Asia-Pacific is forecast to grow at a 9.5% CAGR through 2031.

Key Market Trends

Global Struvite Fertilizers Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Phosphorus Scarcity and Import Dependency	+2.5%	Global, strongest in Europe, Japan, South Korea, and India	Long term (≥ 4 years)
Regulatory Nutrient Recovery Mandates	+2.2%	Europe, North America, and Asia-Pacific, strongest in Germany, the Netherlands, and Belgium	Medium term (2-4 years)
Circular Economy Adoption in Wastewater Recovery	+1.6%	Europe first, followed by North America and Asia-Pacific	Medium term (2-4 years)
Premium Demand for Low-Carbon and Organic-Approved Inputs	+1.1%	Europe and North America, with early gains in Germany, the Netherlands, and the United States's Pacific Northwest	Short term (≤ 2 years)
Process Integration Gains From Automated Nutrient Recovery	+0.8%	Asia-Pacific first, followed by North America and Europe	Medium term (2-4 years)
Recovered Nutrient Standardization Opening New Procurement Channels	+0.5%	North America, Europe, and selected markets in the Middle East and South Korea	Long term (≥ 4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The global struvite fertilizers market is moderately fragmented in 2025. Ostara Nutrient Recovery Technologies Inc., Veolia Water Technologies, and SUEZ Water Technologies and Solutions formed the leading tier in 2025. Competition is divided between broad wastewater technology integrators and more focused nutrient recovery companies. Integrators such as Veolia, SUEZ, Xylem, WABAG, and Thermax can incorporate struvite recovery into larger municipal infrastructure programs. Specialists such as Ostara, NuReSys, Multifarm Harvest, and AirPrex compete more directly on fertilizer output quality, agronomic performance support, and access to downstream offtake.

A gap remains in the struvite fertilizers market between wastewater technology deployment and fertilizer channel development. Some utilities install recovery systems through engineering contractors but lack strong commercial routes to sell fertilizer output, which reduces the value captured from recovered phosphorus. Licensing and partnership models are one response to this gap. Xylem's licensing partnership with Ostara around the Pearl recovery system illustrates how technology and commercialization can be linked across deployments. Patent protection in reactor design, automated dosing, and granule conditioning also favors firms with an established technology base, making it harder for smaller entrants to scale quickly even when they have promising process ideas.

The competitive landscape is also shaped by adjacent suppliers whose products support recovery operations without owning the core struvite process. Ecolab and Solenis are positioned to benefit as larger output volumes increase demand for water treatment chemistry, precipitation reagents, and process control support. Solenis expanded its position through the acquisition of NCH Corporation in November 2025, which widened its industrial water and hygiene platform across more than 160 countries. Ostara's June 2025 launch of CG P2X in Western Canada through Taurus Agricultural Marketing demonstrated how companies are investing in stronger downstream distribution rather than relying solely on technology sales. WABAG's large wastewater awards in the UAE and Georgia during 2026 further illustrate how engineering firms are building future nutrient recovery options through broader water infrastructure expansion. The struvite fertilizers market is therefore competitive in both technology and route to market, and success depends on linking wastewater recovery with reliable fertilizer offtake.

Struvite Fertilizers Industry Leaders* Ostara Nutrient Recovery Technologies Inc.

* Veolia Water Technologies

* SUEZ Water Technologies and Solutions

* CNP - Technology Water and Biosolids Corporation

* Nijhuis Saur Industries

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global Struvite Fertilizers Market Report ScopeStruvite fertilizer is a slow-release, eco-friendly mineral fertilizer made of magnesium ammonium phosphate hexahydrate.

The Struvite Fertilizers Market Report is segmented by product type (granular struvite, powdered struvite, and liquid struvite), by application (agriculture, horticulture, turf and ornamental, and others), by crop type (cereals and grains, fruits and vegetables, oilseeds and pulses, and others), and by geography (North

America, South America, Europe, Asia-Pacific, the Middle East, and Africa). The market forecasts are provided in terms of value in USD.

By Product TypeGranular Struvite |
Powdered Struvite |
Liquid Struvite |

Segmentation Accordion Item

By RegionNorth America | United States |
| Canada |
| Mexico |
| Rest of North America |
South America | Brazil |
| Argentina |
| Rest of South America |
Europe | Germany |
| France |
| United Kingdom |
| Italy |
| Spain |
| Russia |
| Turkey |
| Rest of Europe |
Asia-Pacific | China |
| Japan |
| India |
| South Korea |
| Rest of Asia-Pacific |
Middle East | Saudi Arabia |
| United Arab Emirates |
| Rest of Middle East |
Africa | South Africa |
| Egypt |
| Rest of Africa |

Frequently Asked Questions

What is the projected value of struvite fertilizers by 2031?

The struvite fertilizers market is projected to reach USD 0.94 billion by 2031, rising from USD 0.65 billion in 2026 at a 7.8% CAGR.

Which region leads global demand for struvite fertilizers?

North America led in 2025 with a 35.8% share, supported by established commercial production and clearer treatment of recovered phosphorus products.

Which region is projected to grow the fastest through 2031?

Asia-Pacific is the fastest growing region, with a projected CAGR of 9.5% through 2031, driven by regulatory action and expanding wastewater recovery systems.

Which product format is most widely used today?

Granular struvite led with 45.2% share in 2025 because it fits existing fertilizer spreading equipment and established pellet production systems.

Which application is growing the fastest?

Horticulture is projected to grow at an 8.6% CAGR through 2031 because premium crop systems place higher value on traceability, organic approval, and low runoff

performance.