

Global Chemical Enhanced Oil Recovery (EOR / IOR) Market Size Study & Forecast, by Origin, Type, Technique, Application, and Regional Forecasts 2025-2035

<https://marketpublishers.com/r/G3A40693DBF7EN.html>

Date: July 2025

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: G3A40693DBF7EN

Abstracts

The Global Chemical Enhanced Oil Recovery (EOR / IOR) Market is estimated to be valued at approximately USD 1.08 billion in 2024 and is projected to grow at a compound annual growth rate (CAGR) of 5.00% over the forecast period from 2025 to 2035. As conventional reservoirs mature and oil extraction becomes increasingly complex, energy companies are turning to chemical-based recovery solutions to prolong well productivity and maximize extraction efficiency. Chemical Enhanced Oil Recovery (CEOR) employs advanced formulations—ranging from surfactants and polymers to alkaline agents—to alter the properties of the reservoir and displace trapped hydrocarbons more effectively. The growing necessity to extract residual oil in a cost-effective manner is compelling oil producers to adopt CEOR technologies, especially in regions with aging fields and high recovery challenges. With both petro-based and bio-based chemical solutions advancing in efficacy and cost optimization, the CEOR market is steadily carving its place as an indispensable technology in the energy value chain.

The upward trajectory of CEOR adoption is further reinforced by rising crude oil demand and global upstream reinvestment. While polymer flooding remains the most established CEOR technique, emerging methods such as alkaline-surfactant-polymer (ASP) flooding are gaining momentum due to their enhanced recovery factors in difficult reservoirs. Surfactant-polymer blends, when injected into oilfields, reduce interfacial tension and modify rock wettability, enabling the mobilization of residual oil. The demand for such high-efficiency recovery methods is intensifying across onshore and offshore operations, particularly as operators aim to extend field lifespans and improve project economics. Additionally, the transition toward more sustainable production

practices is triggering interest in bio-based chemical alternatives, which offer reduced environmental impact without compromising on performance. However, volatility in crude oil prices and the substantial capital expenditure associated with CEOR projects could moderate market uptake, especially in small- to mid-sized enterprises.

Regionally, North America stands out as a mature yet dynamic CEOR market, driven by decades of innovation and widespread deployment of polymer and surfactant flooding technologies across the Permian, Williston, and Western Canada sedimentary basins. The region's well-developed oilfield infrastructure and strong R&D ecosystem support continuous refinement of CEOR techniques. Meanwhile, the Asia Pacific region is poised to witness the fastest growth during the forecast period, propelled by energy security imperatives, increasing production from mature fields in China and India, and rising government support for enhanced recovery methods. The Middle East is also emerging as a high-potential market, leveraging abundant oil reserves and an appetite for efficiency-maximizing technologies to boost recovery factors. In Latin America, offshore oilfield revitalization in Brazil and mature basin recovery in Argentina are expected to bolster regional demand. Europe, though relatively conservative in CEOR adoption, is gradually exploring these solutions for sustainability-aligned field recovery projects.

Major market players included in this report are:

Halliburton Company

Schlumberger Limited

BASF SE

Dow Inc.

Baker Hughes Company

SNF Floerger

Huntsman Corporation

Solvay SA

Nouryon

Stepan Company

Oil Chem Technologies

Innospec Inc.

Shell Chemicals

ChampionX Corporation

Ashland Global Holdings Inc.

Global Chemical Enhanced Oil Recovery (EOR / IOR) Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of

the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Origin:

Petro-based

Bio-based

By Type:

Surfactants

Water Soluble Polymers

Polymer Gels

Biopolymers

Alkaline Chemicals

By Technique:

Polymer Flooding

Surfactant-Polymer Flooding

Alkaline Surfactant Polymer Flooding

By Application:

Onshore

Offshore

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

Contents

CHAPTER 1. GLOBAL CHEMICAL ENHANCED OIL RECOVERY (EOR / IOR) MARKET REPORT SCOPE & METHODOLOGY

- 1.1. Research Objective
- 1.2. Research Methodology
 - 1.2.1. Forecast Model
 - 1.2.2. Desk Research
 - 1.2.3. Top Down and Bottom Up Approach
- 1.3. Research Attributes
- 1.4. Scope of the Study
 - 1.4.1. Market Definition
 - 1.4.2. Market Segmentation
- 1.5. Research Assumption
 - 1.5.1. Inclusion & Exclusion
 - 1.5.2. Limitations
 - 1.5.3. Years Considered for the Study

CHAPTER 2. EXECUTIVE SUMMARY

- 2.1. CEO/CXO Standpoint
- 2.2. Strategic Insights
- 2.3. ESG Analysis
- 2.4. Key Findings

CHAPTER 3. GLOBAL CHEMICAL ENHANCED OIL RECOVERY (EOR / IOR) MARKET FORCES ANALYSIS

- 3.1. Market Forces Shaping the Global Chemical EOR/IOR Market (2024–2035)
- 3.2. Drivers
 - 3.2.1. Urgent need to maximize extraction from mature fields
 - 3.2.2. Rising global crude oil demand and upstream reinvestment
 - 3.2.3. Advances in polymer and surfactant formulations
- 3.3. Restraints
 - 3.3.1. Volatility of crude oil prices affecting project economics
 - 3.3.2. High capital expenditure and operational complexity
- 3.4. Opportunities
 - 3.4.1. Growing interest in bio based chemical alternatives

3.4.2. Rapid adoption in Asia Pacific and Middle East mature basins

CHAPTER 4. GLOBAL CHEMICAL EOR/IOR INDUSTRY ANALYSIS

- 4.1. Porter's Five Forces Model
 - 4.1.1. Bargaining Power of Buyer
 - 4.1.2. Bargaining Power of Supplier
 - 4.1.3. Threat of New Entrants
 - 4.1.4. Threat of Substitutes
 - 4.1.5. Competitive Rivalry
- 4.2. Porter's Five Forces Forecast Model (2024–2035)
- 4.3. PESTEL Analysis
 - 4.3.1. Political
 - 4.3.2. Economical
 - 4.3.3. Social
 - 4.3.4. Technological
 - 4.3.5. Environmental
 - 4.3.6. Legal
- 4.4. Top Investment Opportunities
- 4.5. Top Winning Strategies (2025)
- 4.6. Market Share Analysis (2024–2025)
- 4.7. Global Pricing Analysis and Trends 2025
- 4.8. Analyst Recommendation & Conclusion

CHAPTER 5. GLOBAL CHEMICAL EOR/IOR MARKET SIZE & FORECASTS BY ORIGIN 2025–2035

- 5.1. Petro based
- 5.2. Bio based

CHAPTER 6. GLOBAL CHEMICAL EOR/IOR MARKET SIZE & FORECASTS BY TYPE 2025–2035

- 6.1. Surfactants
- 6.2. Water Soluble Polymers
- 6.3. Polymer Gels
- 6.4. Biopolymers
- 6.5. Alkaline Chemicals

CHAPTER 7. GLOBAL CHEMICAL EOR/IOR MARKET SIZE & FORECASTS BY TECHNIQUE 2025–2035

- 7.1. Polymer Flooding
- 7.2. Surfactant Polymer Flooding
- 7.3. Alkaline Surfactant Polymer Flooding

CHAPTER 8. GLOBAL CHEMICAL EOR/IOR MARKET SIZE & FORECASTS BY APPLICATION 2025–2035

- 8.1. Onshore
- 8.2. Offshore

CHAPTER 9. GLOBAL CHEMICAL EOR/IOR MARKET SIZE & FORECASTS BY REGION 2025–2035

- 9.1. North America Chemical EOR/IOR Market
 - 9.1.1. U.S.
 - 9.1.2. Canada
- 9.2. Europe Chemical EOR/IOR Market
 - 9.2.1. UK
 - 9.2.2. Germany
 - 9.2.3. France
 - 9.2.4. Spain
 - 9.2.5. Italy
 - 9.2.6. Rest of Europe
- 9.3. Asia Pacific Chemical EOR/IOR Market
 - 9.3.1. China
 - 9.3.2. India
 - 9.3.3. Japan
 - 9.3.4. Australia
 - 9.3.5. South Korea
 - 9.3.6. Rest of Asia Pacific
- 9.4. Latin America Chemical EOR/IOR Market
 - 9.4.1. Brazil
 - 9.4.2. Mexico
- 9.5. Middle East & Africa Chemical EOR/IOR Market
 - 9.5.1. UAE
 - 9.5.2. Saudi Arabia (KSA)

9.5.3. South Africa

9.5.4. Rest of Middle East & Africa

CHAPTER 10. COMPETITIVE INTELLIGENCE

10.1. Top Market Strategies

10.2. Halliburton Company

Company Overview

Key Executives

Company Snapshot

Financial Performance (Subject to Data Availability)

Product/Services Port

Recent Development

Market Strategies

SWOT Analysis

10.3. Schlumberger Limited

10.4. BASF SE

10.5. Dow Inc.

10.6. Baker Hughes Company

10.7. SNF Floerger

10.8. Huntsman Corporation

10.9. Solvay SA

10.10. Nouryon

10.11. Stepan Company

10.12. Oil Chem Technologies

10.13. Innospec Inc.

10.14. Shell Chemicals

10.15. ChampionX Corporation

10.16. Ashland Global Holdings Inc.

List Of Tables

LIST OF TABLES

- Table 1. Global Chemical EOR/IOR Market, Report Scope
- Table 2. Global Market Estimates & Forecasts by Origin 2025–2035
- Table 3. Global Market Estimates & Forecasts by Type 2025–2035
- Table 4. Global Market Estimates & Forecasts by Technique 2025–2035
- Table 5. Global Market Estimates & Forecasts by Application 2025–2035
- Table 6. Global Market Estimates & Forecasts by Region 2025–2035
- Table 7. U.S. Market Estimates & Forecasts, 2025–2035
- Table 8. Canada Market Estimates & Forecasts, 2025–2035
- Table 9. UK Market Estimates & Forecasts, 2025–2035
- Table 10. Germany Market Estimates & Forecasts, 2025–2035
- Table 11. France Market Estimates & Forecasts, 2025–2035
- Table 12. Spain Market Estimates & Forecasts, 2025–2035
- Table 13. Italy Market Estimates & Forecasts, 2025–2035
- Table 14. Rest of Europe Market Estimates & Forecasts, 2025–2035
- Table 15. China Market Estimates & Forecasts, 2025–2035
- Table 16. India Market Estimates & Forecasts, 2025–2035
- Table 17. Japan Market Estimates & Forecasts, 2025–2035
- Table 18. Australia Market Estimates & Forecasts, 2025–2035
- Table 19. South Korea Market Estimates & Forecasts, 2025–2035
- Table 20. Brazil Market Estimates & Forecasts, 2025–2035
- Table 21. Mexico Market Estimates & Forecasts, 2025–2035
- Table 22. UAE Market Estimates & Forecasts, 2025–2035
- Table 23. Saudi Arabia Market Estimates & Forecasts, 2025–2035
- Table 24. South Africa Market Estimates & Forecasts, 2025–2035
- Table 25. Rest of Middle East & Africa Market Estimates & Forecasts, 2025–2035

List Of Figures

LIST OF FIGURES

- Fig 1. Global Chemical EOR/IOR Market, Research Methodology
- Fig 2. Market Estimation Techniques
- Fig 3. Global Market Size Estimates & Forecast Methods
- Fig 4. Key Trends in Chemical EOR/IOR Market (2025)
- Fig 5. Market Growth Prospects (2024–2035)
- Fig 6. Porter's Five Forces Model
- Fig 7. PESTEL Analysis
- Fig 8. Value Chain Analysis
- Fig 9. Market by Origin, 2025 & 2035
- Fig 10. Market by Type, 2025 & 2035
- Fig 11. Market by Technique, 2025 & 2035
- Fig 12. Market by Application, 2025 & 2035
- Fig 13. North America Market, 2025 & 2035
- Fig 14. Europe Market, 2025 & 2035
- Fig 15. Asia Pacific Market, 2025 & 2035
- Fig 16. Latin America Market, 2025 & 2035
- Fig 17. Middle East & Africa Market, 2025 & 2035
- Fig 18. Company Market Share Analysis (2025)

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