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Global Enhanced Oil Recovery Agents Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/G90D369D9FD3EN.html
Date: August 2026
Pages: 135
Price: US$ 4,480.00 (Single User License)
ID: G90D369D9FD3EN

Abstracts

The global Enhanced Oil Recovery Agents market size is expected to reach $ 4904 million by 2032, rising at a market growth of 10.9% CAGR during the forecast period (2026-2032).

Enhanced Oil Recovery Agents are chemical agents used in oilfield operations to improve oil recovery rates. These agents work by altering the fluid properties in the reservoir, reducing the viscosity of oil, or changing the oil-water interface to enhance oil flow and increase oil extraction efficiency. Chemical Enhanced Oil Recovery (CEOR) techniques include alkaline flooding, surfactant flooding, and polymer flooding, as well as their binary and ternary combinations such as alkali-surfactant (AS) and alkali-surfactant-polymer (ASP) flooding. The global average selling price for enhanced oil recovery agents is approximately US$1,200 per ton. The average sales volume in the base year is estimated at 1,960k tons. The industry average gross margin is approximately 35%, with typical ranges between 25% and 45%, reflecting the commodity chemical nature combined with specialized formulation requirements. The upstream segment includes manufacturers of polymer monomers, surfactants, alkaline chemicals, and other raw materials. The midstream segment comprises enhanced oil recovery agent manufacturers that formulate, blend, and distribute finished products. The downstream segment encompasses oil production companies, oilfield service providers, and petrochemical companies that utilize these agents in onshore and offshore oilfield operations to maximize production from mature fields and extract residual oil from reservoirs.

The Enhanced Oil Recovery Agents market is undergoing significant transformation driven by the depletion of conventional oil reserves, the increasing global demand for energy, and the imperative to maximize production from mature fields. The industry is

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witnessing a fundamental shift from simple single-agent flooding to sophisticated hybrid chemical approaches that integrate alkali-surfactant-polymer combinations and low-salinity waterflooding protocols. Technological innovations in polymer chemistry?particularly the optimization of high-molecular-weight formulations with improved thermal and salinity tolerance?have extended the applicability of polymer flooding into more challenging reservoir environments. Advances in surfactant design, including tailored hydrophilic-lipophilic balance and microemulsion engineering, have improved wettability alteration and mobilization of trapped oil in diverse lithologies. The integration of smart injection control, real-time downhole monitoring, and digital optimization is reducing uncertainty and accelerating learning cycles from pilot phases. Sustainability expectations are reshaping the competitive landscape, with increasing pressure on formulators to adopt greener chemistries, reduce freshwater use, and prioritize recyclability of produced water. The implementation of new tariff policies in 2025 has introduced significant complexities across global supply chains, prompting procurement teams to accelerate qualification of regional suppliers and reengineer formulations to rely on more readily available feedstocks. North America and the Middle East are key regions driving market growth, with advancements in technology and increasing investments in oilfield development projects. As the oil and gas industry seeks innovative solutions to optimize production levels from existing reservoirs, the Enhanced Oil Recovery Agents market is poised for sustained expansion.

This report studies the global Enhanced Oil Recovery Agents production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Enhanced Oil Recovery Agents and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Enhanced Oil Recovery Agents that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Enhanced Oil Recovery Agents total production and demand, 2021-2032, (Tons)
Global Enhanced Oil Recovery Agents total production value, 2021-2032, (USD Million)
Global Enhanced Oil Recovery Agents production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)
Global Enhanced Oil Recovery Agents consumption by region & country, CAGR, 2021-2032 & (Tons)
U.S. VS China: Enhanced Oil Recovery Agents domestic production, consumption, key domestic manufacturers and share

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Global Enhanced Oil Recovery Agents production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)
Global Enhanced Oil Recovery Agents production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)
Global Enhanced Oil Recovery Agents production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Enhanced Oil Recovery Agents market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Jiangsu Meside Chemicals, Shandong Xingang Chemicals, Shandong Baomo Biochemicals, Shaanxi Deguan Biotechnology, Deshi Energy Technology Group, Global Envirotech, Envirofluid, Honeywell, Clariant, BASF, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Enhanced Oil Recovery Agents market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Enhanced Oil Recovery Agents Market, By Region:

United States

China

Europe

Japan

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South Korea

ASEAN

India

Rest of World

Global Enhanced Oil Recovery Agents Market, Segmentation by Type:

Biological Oil Displacement Agent

Chemical Oil Displacement Agent

Global Enhanced Oil Recovery Agents Market, Segmentation by Physical Form:

Liquid / Solution Form

Powder / Solid Form

Global Enhanced Oil Recovery Agents Market, Segmentation by Function:

Single-Function Agents

Multi-Function Composite Agents

Global Enhanced Oil Recovery Agents Market, Segmentation by Application:

Onshore

Offshore

Companies Profiled:

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Jiangsu Meside Chemicals

Shandong Xingang Chemicals

Shandong Baomo Biochemicals

Shaanxi Deguan Biotechnology

Deshi Energy Technology Group

Global Envirotech

Envirofluid

Honeywell

Clariant

BASF

ExxonMobil

LanzaTech

Olin Corporation

Schlumberger

Jurong Chemicals

Key Questions Answered:
1. How big is the global Enhanced Oil Recovery Agents market?
2. What is the demand of the global Enhanced Oil Recovery Agents market?
3. What is the year over year growth of the global Enhanced Oil Recovery Agents market?
4. What is the production and production value of the global Enhanced Oil Recovery Agents market?
5. Who are the key producers in the global Enhanced Oil Recovery Agents market?

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6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Enhanced Oil Recovery Agents Introduction
1.2 World Enhanced Oil Recovery Agents Supply & Forecast
  1.2.1 World Enhanced Oil Recovery Agents Production Value (2021 & 2025 & 2032)
  1.2.2 World Enhanced Oil Recovery Agents Production (2021-2032)
  1.2.3 World Enhanced Oil Recovery Agents Pricing Trends (2021-2032)
1.3 World Enhanced Oil Recovery Agents Production by Region (Based on Production Site)
  1.3.1 World Enhanced Oil Recovery Agents Production Value by Region (2021-2032)
  1.3.2 World Enhanced Oil Recovery Agents Production by Region (2021-2032)
  1.3.3 World Enhanced Oil Recovery Agents Average Price by Region (2021-2032)
  1.3.4 North America Enhanced Oil Recovery Agents Production (2021-2032)
  1.3.5 Europe Enhanced Oil Recovery Agents Production (2021-2032)
  1.3.6 China Enhanced Oil Recovery Agents Production (2021-2032)
  1.3.7 Japan Enhanced Oil Recovery Agents Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Enhanced Oil Recovery Agents Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Enhanced Oil Recovery Agents Major Market Trends

2 DEMAND SUMMARY

2.1 World Enhanced Oil Recovery Agents Demand (2021-2032)
2.2 World Enhanced Oil Recovery Agents Consumption by Region
  2.2.1 World Enhanced Oil Recovery Agents Consumption by Region (2021-2026)
  2.2.2 World Enhanced Oil Recovery Agents Consumption Forecast by Region (2027-2032)
2.3 United States Enhanced Oil Recovery Agents Consumption (2021-2032)
2.4 China Enhanced Oil Recovery Agents Consumption (2021-2032)
2.5 Europe Enhanced Oil Recovery Agents Consumption (2021-2032)
2.6 Japan Enhanced Oil Recovery Agents Consumption (2021-2032)
2.7 South Korea Enhanced Oil Recovery Agents Consumption (2021-2032)
2.8 ASEAN Enhanced Oil Recovery Agents Consumption (2021-2032)
2.9 India Enhanced Oil Recovery Agents Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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3.1 World Enhanced Oil Recovery Agents Production Value by Manufacturer (2021-2026)
3.2 World Enhanced Oil Recovery Agents Production by Manufacturer (2021-2026)
3.3 World Enhanced Oil Recovery Agents Average Price by Manufacturer (2021-2026)
3.4 Enhanced Oil Recovery Agents Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Enhanced Oil Recovery Agents Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Enhanced Oil Recovery Agents in 2025
  3.5.3 Global Concentration Ratios (CR8) for Enhanced Oil Recovery Agents in 2025
3.6 Enhanced Oil Recovery Agents Market: Overall Company Footprint Analysis
  3.6.1 Enhanced Oil Recovery Agents Market: Region Footprint
  3.6.2 Enhanced Oil Recovery Agents Market: Company Product Type Footprint
  3.6.3 Enhanced Oil Recovery Agents Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Enhanced Oil Recovery Agents Production Value Comparison
  4.1.1 United States VS China: Enhanced Oil Recovery Agents Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Enhanced Oil Recovery Agents Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Enhanced Oil Recovery Agents Production Comparison
  4.2.1 United States VS China: Enhanced Oil Recovery Agents Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Enhanced Oil Recovery Agents Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Enhanced Oil Recovery Agents Consumption Comparison
  4.3.1 United States VS China: Enhanced Oil Recovery Agents Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Enhanced Oil Recovery Agents Consumption Market Share Comparison (2021 & 2025 & 2032)

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4.4 United States Based Enhanced Oil Recovery Agents Manufacturers and Market Share, 2021-2026
4.4.1 United States Based Enhanced Oil Recovery Agents Manufacturers, Headquarters and Production Site (States, Country)
4.4.2 United States Based Manufacturers Enhanced Oil Recovery Agents Production Value (2021-2026)
4.4.3 United States Based Manufacturers Enhanced Oil Recovery Agents Production (2021-2026)
4.5 China Based Enhanced Oil Recovery Agents Manufacturers and Market Share
4.5.1 China Based Enhanced Oil Recovery Agents Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Enhanced Oil Recovery Agents Production Value (2021-2026)
4.5.3 China Based Manufacturers Enhanced Oil Recovery Agents Production (2021-2026)
4.6 Rest of World Based Enhanced Oil Recovery Agents Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Enhanced Oil Recovery Agents Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Enhanced Oil Recovery Agents Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Enhanced Oil Recovery Agents Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Enhanced Oil Recovery Agents Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Biological Oil Displacement Agent
5.2.2 Chemical Oil Displacement Agent
5.3 Market Segment by Type
5.3.1 World Enhanced Oil Recovery Agents Production by Type (2021-2032)
5.3.2 World Enhanced Oil Recovery Agents Production Value by Type (2021-2032)
5.3.3 World Enhanced Oil Recovery Agents Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PHYSICAL FORM

6.1 World Enhanced Oil Recovery Agents Market Size Overview by Physical Form:

+357 96 030922
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2021 VS 2025 VS 2032
6.2 Segment Introduction by Physical Form
6.2.1 Liquid / Solution Form
6.2.2 Powder / Solid Form
6.3 Market Segment by Physical Form
6.3.1 World Enhanced Oil Recovery Agents Production by Physical Form (2021-2032)
6.3.2 World Enhanced Oil Recovery Agents Production Value by Physical Form (2021-2032)
6.3.3 World Enhanced Oil Recovery Agents Average Price by Physical Form (2021-2032)

7 MARKET ANALYSIS BY FUNCTION

7.1 World Enhanced Oil Recovery Agents Market Size Overview by Function: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Function
7.2.1 Single-Function Agents
7.2.2 Multi-Function Composite Agents
7.3 Market Segment by Function
7.3.1 World Enhanced Oil Recovery Agents Production by Function (2021-2032)
7.3.2 World Enhanced Oil Recovery Agents Production Value by Function (2021-2032)
7.3.3 World Enhanced Oil Recovery Agents Average Price by Function (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Enhanced Oil Recovery Agents Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Onshore
8.2.2 Offshore
8.3 Market Segment by Application
8.3.1 World Enhanced Oil Recovery Agents Production by Application (2021-2032)
8.3.2 World Enhanced Oil Recovery Agents Production Value by Application (2021-2032)
8.3.3 World Enhanced Oil Recovery Agents Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Jiangsu Meside Chemicals

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9.1.1 Jiangsu Meside Chemicals Details
9.1.2 Jiangsu Meside Chemicals Major Business
9.1.3 Jiangsu Meside Chemicals Enhanced Oil Recovery Agents Product and Services
9.1.4 Jiangsu Meside Chemicals Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 Jiangsu Meside Chemicals Recent Developments/Updates
9.1.6 Jiangsu Meside Chemicals Competitive Strengths & Weaknesses
9.2 Shandong Xingang Chemicals
9.2.1 Shandong Xingang Chemicals Details
9.2.2 Shandong Xingang Chemicals Major Business
9.2.3 Shandong Xingang Chemicals Enhanced Oil Recovery Agents Product and Services
9.2.4 Shandong Xingang Chemicals Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 Shandong Xingang Chemicals Recent Developments/Updates
9.2.6 Shandong Xingang Chemicals Competitive Strengths & Weaknesses
9.3 Shandong Baomo Biochemicals
9.3.1 Shandong Baomo Biochemicals Details
9.3.2 Shandong Baomo Biochemicals Major Business
9.3.3 Shandong Baomo Biochemicals Enhanced Oil Recovery Agents Product and Services
9.3.4 Shandong Baomo Biochemicals Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 Shandong Baomo Biochemicals Recent Developments/Updates
9.3.6 Shandong Baomo Biochemicals Competitive Strengths & Weaknesses
9.4 Shaanxi Deguan Biotechnology
9.4.1 Shaanxi Deguan Biotechnology Details
9.4.2 Shaanxi Deguan Biotechnology Major Business
9.4.3 Shaanxi Deguan Biotechnology Enhanced Oil Recovery Agents Product and Services
9.4.4 Shaanxi Deguan Biotechnology Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Shaanxi Deguan Biotechnology Recent Developments/Updates
9.4.6 Shaanxi Deguan Biotechnology Competitive Strengths & Weaknesses
9.5 Deshi Energy Technology Group
9.5.1 Deshi Energy Technology Group Details
9.5.2 Deshi Energy Technology Group Major Business
9.5.3 Deshi Energy Technology Group Enhanced Oil Recovery Agents Product and Services

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9.5.4 Deshi Energy Technology Group Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Deshi Energy Technology Group Recent Developments/Updates
9.5.6 Deshi Energy Technology Group Competitive Strengths & Weaknesses
9.6 Global Envirotech
9.6.1 Global Envirotech Details
9.6.2 Global Envirotech Major Business
9.6.3 Global Envirotech Enhanced Oil Recovery Agents Product and Services
9.6.4 Global Envirotech Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Global Envirotech Recent Developments/Updates
9.6.6 Global Envirotech Competitive Strengths & Weaknesses
9.7 Envirofluid
9.7.1 Envirofluid Details
9.7.2 Envirofluid Major Business
9.7.3 Envirofluid Enhanced Oil Recovery Agents Product and Services
9.7.4 Envirofluid Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Envirofluid Recent Developments/Updates
9.7.6 Envirofluid Competitive Strengths & Weaknesses
9.8 Honeywell
9.8.1 Honeywell Details
9.8.2 Honeywell Major Business
9.8.3 Honeywell Enhanced Oil Recovery Agents Product and Services
9.8.4 Honeywell Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Honeywell Recent Developments/Updates
9.8.6 Honeywell Competitive Strengths & Weaknesses
9.9 Clariant
9.9.1 Clariant Details
9.9.2 Clariant Major Business
9.9.3 Clariant Enhanced Oil Recovery Agents Product and Services
9.9.4 Clariant Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Clariant Recent Developments/Updates
9.9.6 Clariant Competitive Strengths & Weaknesses
9.10 BASF
9.10.1 BASF Details
9.10.2 BASF Major Business

+357 96 030922
info@marketpublishers.com

9.10.3 BASF Enhanced Oil Recovery Agents Product and Services
9.10.4 BASF Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.10.5 BASF Recent Developments/Updates
9.10.6 BASF Competitive Strengths & Weaknesses
9.11 ExxonMobil
9.11.1 ExxonMobil Details
9.11.2 ExxonMobil Major Business
9.11.3 ExxonMobil Enhanced Oil Recovery Agents Product and Services
9.11.4 ExxonMobil Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 ExxonMobil Recent Developments/Updates
9.11.6 ExxonMobil Competitive Strengths & Weaknesses
9.12 LanzaTech
9.12.1 LanzaTech Details
9.12.2 LanzaTech Major Business
9.12.3 LanzaTech Enhanced Oil Recovery Agents Product and Services
9.12.4 LanzaTech Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 LanzaTech Recent Developments/Updates
9.12.6 LanzaTech Competitive Strengths & Weaknesses
9.13 Olin Corporation
9.13.1 Olin Corporation Details
9.13.2 Olin Corporation Major Business
9.13.3 Olin Corporation Enhanced Oil Recovery Agents Product and Services
9.13.4 Olin Corporation Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 Olin Corporation Recent Developments/Updates
9.13.6 Olin Corporation Competitive Strengths & Weaknesses
9.14 Schlumberger
9.14.1 Schlumberger Details
9.14.2 Schlumberger Major Business
9.14.3 Schlumberger Enhanced Oil Recovery Agents Product and Services
9.14.4 Schlumberger Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.14.5 Schlumberger Recent Developments/Updates
9.14.6 Schlumberger Competitive Strengths & Weaknesses
9.15 Jurong Chemicals
9.15.1 Jurong Chemicals Details

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9.15.2 Jurong Chemicals Major Business
9.15.3 Jurong Chemicals Enhanced Oil Recovery Agents Product and Services
9.15.4 Jurong Chemicals Enhanced Oil Recovery Agents Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.15.5 Jurong Chemicals Recent Developments/Updates
9.15.6 Jurong Chemicals Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Enhanced Oil Recovery Agents Industry Chain
10.2 Enhanced Oil Recovery Agents Upstream Analysis
10.2.1 Enhanced Oil Recovery Agents Core Raw Materials
10.2.2 Main Manufacturers of Enhanced Oil Recovery Agents Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Enhanced Oil Recovery Agents Production Mode
10.6 Enhanced Oil Recovery Agents Procurement Model
10.7 Enhanced Oil Recovery Agents Industry Sales Model and Sales Channels
10.7.1 Enhanced Oil Recovery Agents Sales Model
10.7.2 Enhanced Oil Recovery Agents Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World Enhanced Oil Recovery Agents Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Enhanced Oil Recovery Agents Production Value by Region (2021-2026) & (USD Million)
Table 3. World Enhanced Oil Recovery Agents Production Value by Region (2027-2032) & (USD Million)
Table 4. World Enhanced Oil Recovery Agents Production Value Market Share by Region (2021-2026)
Table 5. World Enhanced Oil Recovery Agents Production Value Market Share by Region (2027-2032)
Table 6. World Enhanced Oil Recovery Agents Production by Region (2021-2026) & (Tons)
Table 7. World Enhanced Oil Recovery Agents Production by Region (2027-2032) & (Tons)
Table 8. World Enhanced Oil Recovery Agents Production Market Share by Region (2021-2026)
Table 9. World Enhanced Oil Recovery Agents Production Market Share by Region (2027-2032)
Table 10. World Enhanced Oil Recovery Agents Average Price by Region (2021-2026) & (US$/Ton)
Table 11. World Enhanced Oil Recovery Agents Average Price by Region (2027-2032) & (US$/Ton)
Table 12. Enhanced Oil Recovery Agents Major Market Trends
Table 13. World Enhanced Oil Recovery Agents Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)
Table 14. World Enhanced Oil Recovery Agents Consumption by Region (2021-2026) & (Tons)
Table 15. World Enhanced Oil Recovery Agents Consumption Forecast by Region (2027-2032) & (Tons)
Table 16. World Enhanced Oil Recovery Agents Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Enhanced Oil Recovery Agents Producers in 2025
Table 18. World Enhanced Oil Recovery Agents Production by Manufacturer (2021-2026) & (Tons)

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Table 19. Production Market Share of Key Enhanced Oil Recovery Agents Producers in 2025
Table 20. World Enhanced Oil Recovery Agents Average Price by Manufacturer (2021-2026) & (US$/Ton)
Table 21. Global Enhanced Oil Recovery Agents Company Evaluation Quadrant
Table 22. World Enhanced Oil Recovery Agents Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Enhanced Oil Recovery Agents Production Site of Key Manufacturer
Table 24. Enhanced Oil Recovery Agents Market: Company Product Type Footprint
Table 25. Enhanced Oil Recovery Agents Market: Company Product Application Footprint
Table 26. Enhanced Oil Recovery Agents Competitive Factors
Table 27. Enhanced Oil Recovery Agents New Entrant and Capacity Expansion Plans
Table 28. Enhanced Oil Recovery Agents Mergers & Acquisitions Activity
Table 29. United States VS China Enhanced Oil Recovery Agents Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Enhanced Oil Recovery Agents Production Comparison, (2021 & 2025 & 2032) & (Tons)
Table 31. United States VS China Enhanced Oil Recovery Agents Consumption Comparison, (2021 & 2025 & 2032) & (Tons)
Table 32. United States Based Enhanced Oil Recovery Agents Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Enhanced Oil Recovery Agents Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Enhanced Oil Recovery Agents Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Enhanced Oil Recovery Agents Production (2021-2026) & (Tons)
Table 36. United States Based Manufacturers Enhanced Oil Recovery Agents Production Market Share (2021-2026)
Table 37. China Based Enhanced Oil Recovery Agents Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Enhanced Oil Recovery Agents Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Enhanced Oil Recovery Agents Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Enhanced Oil Recovery Agents Production, (2021-2026) & (Tons)

+357 96 030922
info@marketpublishers.com

Table 41. China Based Manufacturers Enhanced Oil Recovery Agents Production Market Share (2021-2026)
Table 42. Rest of World Based Enhanced Oil Recovery Agents Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Enhanced Oil Recovery Agents Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Enhanced Oil Recovery Agents Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Enhanced Oil Recovery Agents Production, (2021-2026) & (Tons)
Table 46. Rest of World Based Manufacturers Enhanced Oil Recovery Agents Production Market Share (2021-2026)
Table 47. World Enhanced Oil Recovery Agents Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Enhanced Oil Recovery Agents Production by Type (2021-2026) & (Tons)
Table 49. World Enhanced Oil Recovery Agents Production by Type (2027-2032) & (Tons)
Table 50. World Enhanced Oil Recovery Agents Production Value by Type (2021-2026) & (USD Million)
Table 51. World Enhanced Oil Recovery Agents Production Value by Type (2027-2032) & (USD Million)
Table 52. World Enhanced Oil Recovery Agents Average Price by Type (2021-2026) & (US$/Ton)
Table 53. World Enhanced Oil Recovery Agents Average Price by Type (2027-2032) & (US$/Ton)
Table 54. World Enhanced Oil Recovery Agents Production Value by Physical Form, (USD Million), 2021 & 2025 & 2032
Table 55. World Enhanced Oil Recovery Agents Production by Physical Form (2021-2026) & (Tons)
Table 56. World Enhanced Oil Recovery Agents Production by Physical Form (2027-2032) & (Tons)
Table 57. World Enhanced Oil Recovery Agents Production Value by Physical Form (2021-2026) & (USD Million)
Table 58. World Enhanced Oil Recovery Agents Production Value by Physical Form (2027-2032) & (USD Million)
Table 59. World Enhanced Oil Recovery Agents Average Price by Physical Form (2021-2026) & (US$/Ton)
Table 60. World Enhanced Oil Recovery Agents Average Price by Physical Form

+357 96 030922
info@marketpublishers.com

(2027-2032) & (US$/Ton)
Table 61. World Enhanced Oil Recovery Agents Production Value by Function, (USD Million), 2021 & 2025 & 2032
Table 62. World Enhanced Oil Recovery Agents Production by Function (2021-2026) & (Tons)
Table 63. World Enhanced Oil Recovery Agents Production by Function (2027-2032) & (Tons)
Table 64. World Enhanced Oil Recovery Agents Production Value by Function (2021-2026) & (USD Million)
Table 65. World Enhanced Oil Recovery Agents Production Value by Function (2027-2032) & (USD Million)
Table 66. World Enhanced Oil Recovery Agents Average Price by Function (2021-2026) & (US$/Ton)
Table 67. World Enhanced Oil Recovery Agents Average Price by Function (2027-2032) & (US$/Ton)
Table 68. World Enhanced Oil Recovery Agents Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Enhanced Oil Recovery Agents Production by Application (2021-2026) & (Tons)
Table 70. World Enhanced Oil Recovery Agents Production by Application (2027-2032) & (Tons)
Table 71. World Enhanced Oil Recovery Agents Production Value by Application (2021-2026) & (USD Million)
Table 72. World Enhanced Oil Recovery Agents Production Value by Application (2027-2032) & (USD Million)
Table 73. World Enhanced Oil Recovery Agents Average Price by Application (2021-2026) & (US$/Ton)
Table 74. World Enhanced Oil Recovery Agents Average Price by Application (2027-2032) & (US$/Ton)
Table 75. Jiangsu Meside Chemicals Basic Information, Manufacturing Base and Competitors
Table 76. Jiangsu Meside Chemicals Major Business
Table 77. Jiangsu Meside Chemicals Enhanced Oil Recovery Agents Product and Services
Table 78. Jiangsu Meside Chemicals Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. Jiangsu Meside Chemicals Recent Developments/Updates
Table 80. Jiangsu Meside Chemicals Competitive Strengths & Weaknesses

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Table 81. Shandong Xingang Chemicals Basic Information, Manufacturing Base and Competitors
Table 82. Shandong Xingang Chemicals Major Business
Table 83. Shandong Xingang Chemicals Enhanced Oil Recovery Agents Product and Services
Table 84. Shandong Xingang Chemicals Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Shandong Xingang Chemicals Recent Developments/Updates
Table 86. Shandong Xingang Chemicals Competitive Strengths & Weaknesses
Table 87. Shandong Baomo Biochemicals Basic Information, Manufacturing Base and Competitors
Table 88. Shandong Baomo Biochemicals Major Business
Table 89. Shandong Baomo Biochemicals Enhanced Oil Recovery Agents Product and Services
Table 90. Shandong Baomo Biochemicals Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Shandong Baomo Biochemicals Recent Developments/Updates
Table 92. Shandong Baomo Biochemicals Competitive Strengths & Weaknesses
Table 93. Shaanxi Deguan Biotechnology Basic Information, Manufacturing Base and Competitors
Table 94. Shaanxi Deguan Biotechnology Major Business
Table 95. Shaanxi Deguan Biotechnology Enhanced Oil Recovery Agents Product and Services
Table 96. Shaanxi Deguan Biotechnology Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Shaanxi Deguan Biotechnology Recent Developments/Updates
Table 98. Shaanxi Deguan Biotechnology Competitive Strengths & Weaknesses
Table 99. Deshi Energy Technology Group Basic Information, Manufacturing Base and Competitors
Table 100. Deshi Energy Technology Group Major Business
Table 101. Deshi Energy Technology Group Enhanced Oil Recovery Agents Product and Services
Table 102. Deshi Energy Technology Group Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Deshi Energy Technology Group Recent Developments/Updates

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Table 104. Deshi Energy Technology Group Competitive Strengths & Weaknesses
Table 105. Global Envirotech Basic Information, Manufacturing Base and Competitors
Table 106. Global Envirotech Major Business
Table 107. Global Envirotech Enhanced Oil Recovery Agents Product and Services
Table 108. Global Envirotech Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Global Envirotech Recent Developments/Updates
Table 110. Global Envirotech Competitive Strengths & Weaknesses
Table 111. Envirofluid Basic Information, Manufacturing Base and Competitors
Table 112. Envirofluid Major Business
Table 113. Envirofluid Enhanced Oil Recovery Agents Product and Services
Table 114. Envirofluid Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Envirofluid Recent Developments/Updates
Table 116. Envirofluid Competitive Strengths & Weaknesses
Table 117. Honeywell Basic Information, Manufacturing Base and Competitors
Table 118. Honeywell Major Business
Table 119. Honeywell Enhanced Oil Recovery Agents Product and Services
Table 120. Honeywell Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Honeywell Recent Developments/Updates
Table 122. Honeywell Competitive Strengths & Weaknesses
Table 123. Clariant Basic Information, Manufacturing Base and Competitors
Table 124. Clariant Major Business
Table 125. Clariant Enhanced Oil Recovery Agents Product and Services
Table 126. Clariant Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Clariant Recent Developments/Updates
Table 128. Clariant Competitive Strengths & Weaknesses
Table 129. BASF Basic Information, Manufacturing Base and Competitors
Table 130. BASF Major Business
Table 131. BASF Enhanced Oil Recovery Agents Product and Services
Table 132. BASF Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. BASF Recent Developments/Updates
Table 134. BASF Competitive Strengths & Weaknesses

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Table 135. ExxonMobil Basic Information, Manufacturing Base and Competitors
Table 136. ExxonMobil Major Business
Table 137. ExxonMobil Enhanced Oil Recovery Agents Product and Services
Table 138. ExxonMobil Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. ExxonMobil Recent Developments/Updates
Table 140. ExxonMobil Competitive Strengths & Weaknesses
Table 141. LanzaTech Basic Information, Manufacturing Base and Competitors
Table 142. LanzaTech Major Business
Table 143. LanzaTech Enhanced Oil Recovery Agents Product and Services
Table 144. LanzaTech Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. LanzaTech Recent Developments/Updates
Table 146. LanzaTech Competitive Strengths & Weaknesses
Table 147. Olin Corporation Basic Information, Manufacturing Base and Competitors
Table 148. Olin Corporation Major Business
Table 149. Olin Corporation Enhanced Oil Recovery Agents Product and Services
Table 150. Olin Corporation Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. Olin Corporation Recent Developments/Updates
Table 152. Olin Corporation Competitive Strengths & Weaknesses
Table 153. Schlumberger Basic Information, Manufacturing Base and Competitors
Table 154. Schlumberger Major Business
Table 155. Schlumberger Enhanced Oil Recovery Agents Product and Services
Table 156. Schlumberger Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. Schlumberger Recent Developments/Updates
Table 158. Schlumberger Competitive Strengths & Weaknesses
Table 159. Jurong Chemicals Basic Information, Manufacturing Base and Competitors
Table 160. Jurong Chemicals Major Business
Table 161. Jurong Chemicals Enhanced Oil Recovery Agents Product and Services
Table 162. Jurong Chemicals Enhanced Oil Recovery Agents Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Jurong Chemicals Recent Developments/Updates

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Table 164. Jurong Chemicals Competitive Strengths & Weaknesses
Table 165. Global Key Players of Enhanced Oil Recovery Agents Upstream (Raw Materials)
Table 166. Global Enhanced Oil Recovery Agents Typical Customers
Table 167. Enhanced Oil Recovery Agents Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Enhanced Oil Recovery Agents Picture
Figure 2. World Enhanced Oil Recovery Agents Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Enhanced Oil Recovery Agents Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Enhanced Oil Recovery Agents Production (2021-2032) & (Tons)
Figure 5. World Enhanced Oil Recovery Agents Average Price (2021-2032) & (US$/Ton)
Figure 6. World Enhanced Oil Recovery Agents Production Value Market Share by Region (2021-2032)
Figure 7. World Enhanced Oil Recovery Agents Production Market Share by Region (2021-2032)
Figure 8. North America Enhanced Oil Recovery Agents Production (2021-2032) & (Tons)
Figure 9. Europe Enhanced Oil Recovery Agents Production (2021-2032) & (Tons)
Figure 10. China Enhanced Oil Recovery Agents Production (2021-2032) & (Tons)
Figure 11. Japan Enhanced Oil Recovery Agents Production (2021-2032) & (Tons)
Figure 12. Enhanced Oil Recovery Agents Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Enhanced Oil Recovery Agents Consumption (2021-2032) & (Tons)
Figure 15. World Enhanced Oil Recovery Agents Consumption Market Share by Region (2021-2032)
Figure 16. United States Enhanced Oil Recovery Agents Consumption (2021-2032) & (Tons)
Figure 17. China Enhanced Oil Recovery Agents Consumption (2021-2032) & (Tons)
Figure 18. Europe Enhanced Oil Recovery Agents Consumption (2021-2032) & (Tons)
Figure 19. Japan Enhanced Oil Recovery Agents Consumption (2021-2032) & (Tons)
Figure 20. South Korea Enhanced Oil Recovery Agents Consumption (2021-2032) & (Tons)
Figure 21. ASEAN Enhanced Oil Recovery Agents Consumption (2021-2032) & (Tons)
Figure 22. India Enhanced Oil Recovery Agents Consumption (2021-2032) & (Tons)
Figure 23. Producer Shipments of Enhanced Oil Recovery Agents by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Enhanced Oil Recovery Agents Markets in 2025

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Figure 25. Global Four-firm Concentration Ratios (CR8) for Enhanced Oil Recovery Agents Markets in 2025
Figure 26. United States VS China: Enhanced Oil Recovery Agents Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Enhanced Oil Recovery Agents Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Enhanced Oil Recovery Agents Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Enhanced Oil Recovery Agents Production Market Share 2025
Figure 30. China Based Manufacturers Enhanced Oil Recovery Agents Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Enhanced Oil Recovery Agents Production Market Share 2025
Figure 32. World Enhanced Oil Recovery Agents Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Enhanced Oil Recovery Agents Production Value Market Share by Type in 2025
Figure 34. Biological Oil Displacement Agent
Figure 35. Chemical Oil Displacement Agent
Figure 36. World Enhanced Oil Recovery Agents Production Market Share by Type (2021-2032)
Figure 37. World Enhanced Oil Recovery Agents Production Value Market Share by Type (2021-2032)
Figure 38. World Enhanced Oil Recovery Agents Average Price by Type (2021-2032) & (US$/Ton)
Figure 39. World Enhanced Oil Recovery Agents Production Value by Physical Form, (USD Million), 2021 & 2025 & 2032
Figure 40. World Enhanced Oil Recovery Agents Production Value Market Share by Physical Form in 2025
Figure 41. Liquid / Solution Form
Figure 42. Powder / Solid Form
Figure 43. World Enhanced Oil Recovery Agents Production Market Share by Physical Form (2021-2032)
Figure 44. World Enhanced Oil Recovery Agents Production Value Market Share by Physical Form (2021-2032)
Figure 45. World Enhanced Oil Recovery Agents Average Price by Physical Form (2021-2032) & (US$/Ton)
Figure 46. World Enhanced Oil Recovery Agents Production Value by Function, (USD

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Million), 2021 & 2025 & 2032
Figure 47. World Enhanced Oil Recovery Agents Production Value Market Share by Function in 2025
Figure 48. Single-Function Agents
Figure 49. Multi-Function Composite Agents
Figure 50. World Enhanced Oil Recovery Agents Production Market Share by Function (2021-2032)
Figure 51. World Enhanced Oil Recovery Agents Production Value Market Share by Function (2021-2032)
Figure 52. World Enhanced Oil Recovery Agents Average Price by Function (2021-2032) & (US$/Ton)
Figure 53. World Enhanced Oil Recovery Agents Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 54. World Enhanced Oil Recovery Agents Production Value Market Share by Application in 2025
Figure 55. Onshore
Figure 56. Offshore
Figure 57. World Enhanced Oil Recovery Agents Production Market Share by Application (2021-2032)
Figure 58. World Enhanced Oil Recovery Agents Production Value Market Share by Application (2021-2032)
Figure 59. World Enhanced Oil Recovery Agents Average Price by Application (2021-2032) & (US$/Ton)
Figure 60. Enhanced Oil Recovery Agents Industry Chain
Figure 61. Enhanced Oil Recovery Agents Procurement Model
Figure 62. Enhanced Oil Recovery Agents Sales Model
Figure 63. Enhanced Oil Recovery Agents Sales Channels, Direct Sales, and Distribution
Figure 64. Methodology
Figure 65. Research Process and Data Source

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