

Global Petroleum Based Agricultural Spray Oils Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Petroleum Based Agricultural Spray Oils market size is expected to reach \$ 2570 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

Agricultural spray oil is a group of oil-based products that farmers and growers add to a spray tank and apply to crops to help control pests or improve the performance of other crop protection products. In simple terms, it is ?oil made for spraying on plants.? Some spray oils work as pesticides by themselves, while others mainly work as adjuvants (helpers) that make herbicides, insecticides, or fungicides spread better, stick better, or enter the pest or plant surface more effectively. The market for agricultural spray oil includes the manufacturing, formulation, distribution, and on-farm use of these oils across many crops, especially fruit trees, vegetables, vines, and certain field crops where good spray coverage matters.

From a product point of view, spray oils are usually divided into petroleum-based oils and plant-based oils. Petroleum-based spray oils are often called horticultural oils, mineral oils, paraffinic oils, or ?narrow-range? oils, depending on how they are refined and what boiling range they come from. These oils are made from highly refined petroleum fractions so that they are stable, relatively low odor, and less likely to harm plants when used correctly.

Spray oils have two main roles in the field. First, some oils act directly against insects and mites by coating them, blocking their breathing openings, and disrupting the protective wax layer on their bodies. This is why oils are widely used in orchards and specialty crops for pests like scale insects, mites, and some soft-bodied insects. Oils can also help reduce certain plant disease issues indirectly by changing the leaf surface environment, and in some cases they help with powdery mildew management as part of a broader program. Second, many spray oils are used as adjuvants, especially with herbicides. The oil helps the spray droplet spread across the leaf surface, reduces

evaporation, improves wetting on waxy leaves, and can increase penetration of the active ingredient into the plant tissue. This is particularly important when weeds are tough, leaves are dusty, plants are under dry stress, or the target weeds have thicker cuticles.

In 2025, global Petroleum Based Agricultural Spray Oils production reached approximately 577.3 K MT, with an average global market price of around US\$ 2829 per MT. The global single-line production capacity ranges from 30 to 50 K MT per year. The industry's gross profit margin is approximately 20%-25%.

Market trends for agricultural spray oil are strongly shaped by crop protection strategy shifts, especially the move toward integrated pest management (IPM) and the need to use multiple tools rather than relying on a single chemical class. In many regions, growers are facing pest resistance to certain insecticides or acaricides, and weed resistance to herbicides. Spray oils fit into resistance management in a practical way: as direct-contact products, oils can reduce reliance on a single active ingredient for mites and scale, and as adjuvants they can help certain herbicide treatments perform more consistently. This does not mean oils ?solve? resistance on their own, but they often support programs that rotate chemistries and improve overall control results.

Another trend is the continued growth of high-value horticulture and protected cultivation, such as greenhouse vegetables, berries, table grapes, and orchard fruits. These crops are sensitive to appearance and yield losses, and they often have strict residue and quality standards, especially for export. In these systems, growers care about coverage, leaf safety, and predictable performance. Spray oils have a long history in horticulture because they can be effective against certain pests with relatively low residue concerns when used correctly. As these high-value segments expand, demand for well-formulated, crop-safe spray oils and oil-based adjuvants tends to rise.

A third trend is the push for ?safer? and more sustainable crop inputs, which supports interest in plant-based oils and multi-purpose adjuvant blends. Some growers and supply chains prefer products that are perceived as more natural, biodegradable, or aligned with sustainability goals. Vegetable oil-derived adjuvants, including methylated seed oils, have gained attention because they can provide strong wetting and penetration support for some herbicides and insecticides. At the same time, petroleum-based horticultural oils remain widely used because they can be consistent in quality when sourced from well-controlled refining processes. In practice, the market is not simply switching from petroleum to plant oils; instead, it is diversifying. Different oil types are used for different crops, climates, and spray programs.

This report studies the global Petroleum Based Agricultural Spray Oils production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Petroleum Based Agricultural Spray Oils 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 Petroleum Based Agricultural Spray Oils that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Petroleum Based Agricultural Spray Oils total production and demand, 2021-2032, (Kilotons)

Global Petroleum Based Agricultural Spray Oils total production value, 2021-2032, (USD Million)

Global Petroleum Based Agricultural Spray Oils production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Petroleum Based Agricultural Spray Oils consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Petroleum Based Agricultural Spray Oils domestic production, consumption, key domestic manufacturers and share

Global Petroleum Based Agricultural Spray Oils production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Petroleum Based Agricultural Spray Oils production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Petroleum Based Agricultural Spray Oils production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Petroleum Based Agricultural Spray Oils 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 FMC, Helena Agri-Enterprises, Bonide, Winfield United, Resolute Oil, Loveland Products, Nutrien Ag Solutions, Brandt, Eastern Petroleum, Indian Oil Corporation, 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 Petroleum Based Agricultural Spray Oils market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 Petroleum Based Agricultural Spray Oils Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Petroleum Based Agricultural Spray Oils Market, Segmentation by Type:

Low Viscosity Mineral Oil

High Viscosity Mineral Oil

Global Petroleum Based Agricultural Spray Oils Market, Segmentation by Function:

Pesticidal Spray Oils

Adjuvant Spray Oils

Multi-purpose Blends

Global Petroleum Based Agricultural Spray Oils Market, Segmentation by Formulation Type:

Straight Oil

Emulsifiable Concentrate (EC) Oil

Crop Oil Concentrate (COC)

Others

Global Petroleum Based Agricultural Spray Oils Market, Segmentation by Sales Channel:

Online

Offline

Global Petroleum Based Agricultural Spray Oils Market, Segmentation by Application:

Fruit Trees

Ornamental Plants

Vegetable Crops

Other

Companies Profiled:

FMC

Helena Agri-Enterprises

Bonide

Winfield United

Resolute Oil

Loveland Products

Nutrien Ag Solutions

Brandt

Eastern Petroleum

Indian Oil Corporation

Orchex

Shell

Calumet

Corteva Agriscience

Key Questions Answered:

1. How big is the global Petroleum Based Agricultural Spray Oils market?
2. What is the demand of the global Petroleum Based Agricultural Spray Oils market?
3. What is the year over year growth of the global Petroleum Based Agricultural Spray Oils market?
4. What is the production and production value of the global Petroleum Based Agricultural Spray Oils market?
5. Who are the key producers in the global Petroleum Based Agricultural Spray Oils market?
6. What are the growth factors driving the market demand?

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