

Global Petroleum Based Agricultural Spray Oils Market Growth 2026-2032

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Abstracts

The global Petroleum Based Agricultural Spray Oils market size is predicted to grow from US\$ 1598 million in 2025 to US\$ 2488 million in 2032; it is expected to grow at a CAGR of 5.4% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Petroleum Based Agricultural Spray Oils Industry Forecast" looks at past sales and reviews total world Petroleum Based Agricultural Spray Oils sales in 2025, providing a comprehensive analysis by region and market sector of projected Petroleum Based Agricultural Spray Oils sales for 2026 through 2032. With Petroleum Based Agricultural Spray Oils sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Petroleum Based Agricultural Spray Oils industry.

This Insight Report provides a comprehensive analysis of the global Petroleum Based Agricultural Spray Oils landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Petroleum Based Agricultural Spray Oils portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Petroleum Based Agricultural Spray Oils market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Petroleum Based Agricultural Spray Oils and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Petroleum Based Agricultural Spray Oils.

This report presents a comprehensive overview, market shares, and growth opportunities of Petroleum Based Agricultural Spray Oils market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Low Viscosity Mineral Oil

High Viscosity Mineral Oil

Segmentation by Function:

Pesticidal Spray Oils

Adjuvant Spray Oils

Multi-purpose Blends

Segmentation by Formulation Type:

Straight Oil

Emulsifiable Concentrate (EC) Oil

Crop Oil Concentrate (COC)

Others

Segmentation by Sales Channel:

Online

Offline

Segmentation by Application:

Fruit Trees

Ornamental Plants

Vegetable Crops

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Petroleum Based Agricultural Spray Oils market?

What factors are driving Petroleum Based Agricultural Spray Oils market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Petroleum Based Agricultural Spray Oils market opportunities vary by end market size?

How does Petroleum Based Agricultural Spray Oils break out by Type, by Application?

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