

Global Alkyl Biphenyl Heat Transfer Oil Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Alkyl Biphenyl Heat Transfer Oil market size is expected to reach \$ 263 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

In 2025, global sales volume of alkyl biphenyl heat transfer oil reached 48,000 metric tons, with an average price of \$3,668 per metric ton.

Alkyl biphenyl heat transfer oil is a class of compounds composed of short-chain alkyl (such as ethyl, isopropyl) and biphenyl ring. It is usually obtained by distillation of intermediate products obtained by catalytic reforming of isoparaffin mixture or cyclopentadiene mixture. It is also said that alkyl biphenyl heat transfer oil (shello-benzylbtadiene) is a high-viscosity, low-flash-point, and highly volatile liquid generated by cracking of petroleum fractions under the action of catalysts.

The raw material system for alkyl biphenyl heat transfer oil comprises four major categories: biphenyl core materials, alkylating agents, catalysts and auxiliaries, and solvents/utilities. Regarding biphenyl core materials, industrial biphenyl is primarily obtained through the high-temperature thermal cracking and dehydrogenation of benzene (the tubular furnace method, where benzene vapor passes through red-hot pipes?causing two benzene molecules to each lose a hydrogen atom and bond into biphenyl?with an ideal conversion rate of only 8?12%) or via extraction from coal tar distillation. Chinese manufacturers predominantly employ the condensation-dehydrogenation process involving benzene vapor and red-hot furnace tubes; however, variations in heating methods among manufacturers lead to significant differences in energy and material consumption. This process simultaneously generates approximately 10% terphenyl as a by-product; terphenyl can be further hydrogenated to

produce hydrogenated terphenyl (another major class of heat transfer oil). Regarding alkylating agents, the synthesis of ethylbiphenyl utilizes ethylene (C_2H_4) as the ethylating agent, while isopropylbiphenyl synthesis uses propylene (C_3H_6) or isopropanol; as bulk petrochemical products, the price fluctuations of ethylene and propylene directly impact production costs. In terms of catalysts, the synthesis of ethylbiphenyl traditionally employed Lewis acid catalysts such as $AlCl_3$ (aluminum chloride); however, this resulted in large volumes of acidic wastewater and necessitated acid-resistant equipment. Modern processes have shifted toward solid acid catalysts, such as Y-type molecular sieves, enabling cleaner production through catalytic reforming and alkylation reactions; for instance, Jiangsu Zhongneng Chemical Technology successfully synthesized a series of mono-, di-, and tri-ethylbiphenyl products using Y-type molecular sieve catalysts. Regarding solvents and utilities, the reaction requires inert solvents (such as alkanes), fractional distillation necessitates substantial steam and electricity, and product purification requires multi-stage distillation columns.

In terms of cost structure, the production cost of alkyl biphenyl heat transfer oil is primarily composed of raw materials, energy and utilities, and manufacturing overheads. Raw material costs account for 50–65% of total costs; within this category, biphenyl (or benzene feedstock) represents approximately 40–50%, alkylating agents (such as ethylene or propylene) account for 20–30%, and catalysts and additives make up 5–10%. Price fluctuations in benzene (approx. \$600–1,200/tonne) and ethylene/propylene (approx. \$800–1,500/tonne) are primary cost drivers; significant volatility in benzene prices between 2020 and 2023 compelled producers to adopt multi-source procurement and index-linked pricing contracts to hedge against risk. Energy and utility costs account for approximately 15–25%, covering high-temperature heating for benzene cracking/dehydrogenation (approx. 400–500°C), thermal energy for alkylation reactions, and steam consumption for fractional distillation; energy costs can vary by 20–30% among manufacturers due to differences in heating methods. Manufacturing overheads (equipment depreciation, labor, maintenance, and environmental treatment) account for approximately 15–20%, with environmental treatment costs varying significantly depending on whether acidic wastewater treatment (traditional $AlCl_3$ process) or solid catalyst regeneration (molecular sieve process) is employed. Packaging, storage, and transportation costs account for approximately 5–10%.

This report studies the global Alkyl Biphenyl Heat Transfer Oil production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Alkyl Biphenyl Heat Transfer Oil 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 Alkyl Biphenyl Heat Transfer Oil that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Alkyl Biphenyl Heat Transfer Oil total production and demand, 2021-2032, (Tons)

Global Alkyl Biphenyl Heat Transfer Oil total production value, 2021-2032, (USD Million)

Global Alkyl Biphenyl Heat Transfer Oil production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Alkyl Biphenyl Heat Transfer Oil consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Alkyl Biphenyl Heat Transfer Oil domestic production, consumption, key domestic manufacturers and share

Global Alkyl Biphenyl Heat Transfer Oil production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Alkyl Biphenyl Heat Transfer Oil production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Alkyl Biphenyl Heat Transfer Oil production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Alkyl Biphenyl Heat Transfer Oil 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 Eastman (US), R?tgers GmbH (DE), Nippon Chemical (JP), Jiangsu Zhongneng (CN), Hebei Jindong Technology Group Co., Ltd. (CN), Jiangsu Mantuo Chemical Co., Ltd. (CN), 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 Alkyl Biphenyl Heat Transfer Oil 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 Alkyl Biphenyl Heat Transfer Oil Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Alkyl Biphenyl Heat Transfer Oil Market, Segmentation by Type:

Gas Phase

Liquid Phase

Global Alkyl Biphenyl Heat Transfer Oil Market, Segmentation by Alkyl Type:

Ethyl Biphenyl (EBP)

Isopropyl Biphenyl

Other

Global Alkyl Biphenyl Heat Transfer Oil Market, Segmentation by Feedstock:

Petroleum-based

Coal Tar-based

Natural Gas-based

Global Alkyl Biphenyl Heat Transfer Oil Market, Segmentation by Application:

Oil and Gas

Chemical Industry

Pharmaceutical Industry

Food and Beverage Processing

Plastic and Rubber Manufacturing

Other

Companies Profiled:

Eastman (US)

R?tggers GmbH (DE)

Nippon Chemical (JP)

Jiangsu Zhongneng (CN)

Hebei Jindong Technology Group Co., Ltd. (CN)

Jiangsu Mantuo Chemical Co., Ltd. (CN)

Key Questions Answered:

1. How big is the global Alkyl Biphenyl Heat Transfer Oil market?
2. What is the demand of the global Alkyl Biphenyl Heat Transfer Oil market?
3. What is the year over year growth of the global Alkyl Biphenyl Heat Transfer Oil market?
4. What is the production and production value of the global Alkyl Biphenyl Heat Transfer Oil market?
5. Who are the key producers in the global Alkyl Biphenyl Heat Transfer Oil market?
6. What are the growth factors driving the market demand?

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