

Global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) market size is expected to reach \$ 364 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

In 2025, global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) capacity 3960 Tons, sales reached approximately 3761.1 Tons, with an average market price of around 59.5 USD/Kg, industrial gross margin 34%.

Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) is a strategic aromatic dianhydride used to manufacture polyimides requiring exceptional heat resistance, dimensional stability and mechanical strength. The principal commercial product is symmetrical BPDA, commonly referred to as s-BPDA or 4,4'-bipthalic anhydride, with CAS No. 2420-87-3, molecular formula $C_{12}H_6O_4$ and molecular weight of approximately 294.2. It is normally supplied as a white to light-yellow powder or crystalline solid, with a melting point around 298-299°C. Polymer-grade products generally exceed 99.5% purity, while premium electronic grades reach 99.9% or higher and impose tighter controls on moisture, residual tetracarboxylic acid, monoanhydride species, trace metals, color and insoluble particles. The rigid biphenyl structure gives BPDA-derived polyimides high modulus, low thermal expansion and strong chemical resistance, although it also increases precursor viscosity and processing complexity.

The commercial value of BPDA is concentrated in high-performance polyimide films, electronic insulation systems and heat-resistant structural polymers. When polymerized with rigid aromatic diamines such as p-phenylenediamine, BPDA produces highly linear polyimide chains with excellent dimensional stability and low coefficients of thermal

expansion. Major applications include flexible printed-circuit substrates, adhesiveless copper-clad laminates, semiconductor passivation and interlayer insulation, flexible-display support films, motor and cable insulation, high-temperature labels and aerospace composite matrices. Additional uses extend to lithium-ion battery binders, polyimide powders, heat-resistant coatings, separation membranes and precision printer or copier belts. Compared with lower-cost pyromellitic dianhydride systems, BPDA-based formulations command a stronger position where thermal-cycle reliability, metal-laminate compatibility, tensile modulus and dimensional control are critical.

Manufacturing competitiveness is determined by oxidation selectivity, tetracarboxylic-acid purification and high-purity dehydration technology. The dominant industrial route starts from 3,3',4,4'-tetramethylbiphenyl, which is oxidized with molecular oxygen in acetic acid using cobalt-, manganese- and bromine-based catalyst systems. The resulting biphenyltetracarboxylic acid is purified and dehydrated to produce BPDA. Alternative processes use direct coupling or oxidation of phthalic anhydride, including palladium-catalyzed routes, but these require careful catalyst-cost management and stringent residual-metal removal. Dehydration is generally performed between approximately 180°C and 250°C, followed by recrystallization, hot-water purification, vacuum treatment or sublimation. For electronic-grade BPDA, trace palladium, iron, sodium, residual acid and subvisible particles are commercially important because they influence polymer molecular weight, film defects, dielectric performance and circuit reliability.

Future BPDA demand will be driven by thinner flexible circuits, advanced semiconductor packaging, aerospace electrification and localization of high-performance polyimide supply. Higher-density interconnects require films with tighter dimensional tolerances and stronger resistance to soldering temperatures and repeated thermal cycling. Redistribution layers, interlayer dielectrics, chip passivation and temporary carrier systems create additional formulation opportunities for high-purity BPDA copolymers. Electric vehicles, high-voltage motors, low-orbit satellites and advanced aircraft add requirements for corona resistance, radiation durability, high-temperature mechanical retention and long service life. Competitive differentiation will shift from basic assay toward ultra-low metal levels, controlled residual acid, particle management, reproducible polymerization viscosity and application-specific qualification data. Manufacturing development will emphasize continuous oxidation, catalyst recovery, solvent recycling and automated purification, while Chinese suppliers will focus on qualifying material for premium films, electronic varnishes and semiconductor-grade polyimides rather than competing only in standard dianhydride supply.

This report studies the global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) 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 Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) total production and demand, 2021-2032, (Tons)

Global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) total production value, 2021-2032, (USD Million)

Global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) domestic production, consumption, key domestic manufacturers and share

Global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) production by Purity, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) 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 Mitsubishi Chemical, JFE Chemical Corporation, UBE Corporation, Hebei Haili Evergreen New Materials, Tsaker New Energy Tech, Chinatech (Tianjin) Chemical, Shanghai GuChuang New Chemical Materials, Hubei Shishun Biological, Shanxi Libolong New

Material, Vesino Industrial, 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 Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/kg) by manufacturer, by Purity, 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 Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Biphenyl-3,3',4,4'-Tetracarboxylic Dianhydride (BPDA) Market, Segmentation by Purity:

99.5%

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