

Global Isopropyl Biphenyl Heat Transfer Fluid Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Isopropyl Biphenyl Heat Transfer Fluid market size is expected to reach \$ 168 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

In 2025, global sales volume of isopropyl biphenyl heat transfer fluid reached 32,000 metric tons, with an average price of \$3,584 per metric ton.

Isopropyl biphenyl heat transfer oil is mainly composed of isopropyl biphenyl or its mixture. This type of compound has high thermal stability and excellent heat transfer performance. Its typical characteristics include high purity, low vapor pressure and good thermal stability within a specific temperature range (such as below 330°C). In addition, isopropyl biphenyl heat transfer oil also has excellent anti-coking performance, which can prevent the formation of solid particles and coke scale, thereby ensuring the reliable operation of the heat transfer oil system.

The raw material system for isopropyl biphenyl heat transfer fluid comprises four major categories: biphenyl core materials, isopropylation 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 passing through red-hot furnace tubes; 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 fluid). Regarding isopropylation agents, the synthesis of isopropyl biphenyl utilizes propylene (C_3H_6) or isopropanol (IPA) to introduce the isopropyl group onto the biphenyl ring via a Friedel-Crafts alkylation reaction. As a bulk petrochemical product, propylene's price fluctuations directly impact production costs (ranging from approximately \$800 to \$1,500 per ton). Regarding catalysts, traditional processes utilized Lewis acid or Brønsted acid catalysts such as $AlCl_3$ (aluminum chloride) or H_2SO_4 (concentrated sulfuric acid); however, these generated large volumes of acidic wastewater and required acid-resistant equipment. Modern processes have shifted toward solid acid catalysts such as Y-type molecular sieves and Beta zeolites enabling cleaner production through catalytic reforming and alkylation. Regarding solvents and utilities, the reaction requires inert solvents (such as alkanes); fractional distillation necessitates substantial steam and electricity, while product purification requires multi-stage distillation columns to separate meta- and para-isomers.

In terms of cost structure, the production cost of isopropyl biphenyl heat transfer fluid 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% of raw material costs; isopropylation agents such as propylene or isopropanol account for 20–30%; and catalysts and auxiliaries make up 5–10%. Price fluctuations in benzene (approx. \$600–1,200/tonne) and 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% of the total, covering requirements such as high-temperature heating (approx. 400–500°C) for benzene cracking/dehydrogenation, thermal energy for Friedel-Crafts alkylation, and steam consumption for fractional distillation; energy costs can vary by 20–30% between manufacturers depending on the heating method used (electric vs. gas-fired). Manufacturing overheads (equipment depreciation, labor, maintenance, and environmental treatment) account for approximately 15–20% of costs; environmental treatment expenses vary significantly based on the process—specifically, acidic wastewater treatment (associated with the traditional $AlCl_3$ process) versus solid catalyst regeneration (associated with the molecular sieve process). While the use of solid acid catalysts, such as Y-type molecular sieves, can drastically reduce wastewater treatment costs, the catalysts themselves are expensive and require periodic regeneration. Packaging, storage, and transportation costs account for 5–10%.

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

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

Highlights and key features of the study

Global Isopropyl Biphenyl Heat Transfer Fluid total production and demand, 2021-2032, (Tons)

Global Isopropyl Biphenyl Heat Transfer Fluid total production value, 2021-2032, (USD Million)

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

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

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

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

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

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

This report profiles key players in the global Isopropyl Biphenyl Heat Transfer Fluid 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), 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 Isopropyl Biphenyl Heat Transfer Fluid 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 Isopropyl Biphenyl Heat Transfer Fluid Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Isopropyl Biphenyl Heat Transfer Fluid Market, Segmentation by Type:

Gas Phase

Liquid Phase

Global Isopropyl Biphenyl Heat Transfer Fluid Market, Segmentation by Isopropyl Substitution Positions:

Ethyl Biphenyl (EBP)

Isopropyl Biphenyl

Global Isopropyl Biphenyl Heat Transfer Fluid 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?tgers GmbH (DE)

Nippon Chemical (JP)

Jiangsu Zhongneng (CN)

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

Key Questions Answered:

1. How big is the global Isopropyl Biphenyl Heat Transfer Fluid market?
2. What is the demand of the global Isopropyl Biphenyl Heat Transfer Fluid market?
3. What is the year over year growth of the global Isopropyl Biphenyl Heat Transfer Fluid market?
4. What is the production and production value of the global Isopropyl Biphenyl Heat

Transfer Fluid market?

5. Who are the key producers in the global Isopropyl Biphenyl Heat Transfer Fluid market?

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

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