

# Diphenyl Oxide Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### Diphenyl Oxide Market Summary

#### Introduction

Diphenyl Oxide (DPO) is an aromatic compound primarily used as a key component in heat transfer fluids when combined with biphenyl to form a eutectic mixture. This mixture is prized for its exceptional thermal stability and efficiency, making it a preferred choice in industrial heat transfer systems for chemical processing and manufacturing. Beyond this, DPO serves as a solvent in chemicals, fragrances, and petrochemicals, leveraging its chemical stability and solubility properties. The DPO market is a niche yet vital segment of the specialty chemicals industry, driven by demand from industrial applications requiring high-performance materials.

Production of DPO demands precision to meet stringent purity standards for high-temperature uses, and the market is supported by a concentrated group of key players. The global market is projected to reach USD 200-400 million by 2025, with a CAGR of 3.5%-6.5% through 2030. Growth is propelled by industrial expansion, particularly in Asia-Pacific, where Jiangsu Zhongneng Chemical Technology Co. Ltd. is set to launch a 10,000-ton DPO facility in Q1 2025 to meet China's heat transfer fluid demand.

#### Market Size and Growth Forecast

The global diphenyl oxide market is expected to grow to USD 200-400 million by 2025, with a CAGR ranging from 3.5% to 6.5% from 2025 to 2030. This expansion is driven by increasing demand for biphenyl-based heat transfer fluids in industrial applications,

alongside steady use as a solvent in specialty chemicals. The market benefits from industrial growth in key regions and capacity investments like Jiangsu Zhongneng's project. However, competition from alternative fluids and regulatory pressures on aromatic compounds moderate its trajectory. The forecast reflects a robust niche market with strong industrial underpinnings.

## Regional Analysis

The DPO market varies regionally, influenced by industrial activity and application demand.

**Asia-Pacific:** Growth is estimated at 4.0%-7.0%. China dominates, driven by its manufacturing sector and heat transfer fluid needs, with trends in capacity expansion to support local production. India also contributes, focusing on industrial growth.

**North America:** Growth ranges from 3.0%-5.5%. The United States leads, utilizing DPO in chemical processing and high-temperature systems, with trends emphasizing efficiency and performance in industrial fluids.

**Europe:** Growth is projected at 2.5%-4.5%. Germany and France drive demand, with trends toward sustainable industrial processes and high-purity solvents in chemical applications.

**Rest of the World:** Growth is estimated at 2.0%-4.0%. Emerging markets in Latin America and the Middle East show potential, with trends tied to industrialization and infrastructure projects.

## Application Analysis

DPO's applications reflect its industrial utility, with distinct growth patterns.

**Biphenyl-based Derivatives Heat Transfer Fluid:** Growth is estimated at 4.0%-6.5%. This dominant segment drives demand through its use in chemical processing, with trends in improving thermal efficiency and durability in high-temperature systems.

**Solvent:** Growth ranges from 3.0%-5.0%. DPO's role in chemicals, fragrances, and petrochemicals supports steady demand, with trends toward high-purity solvents for

specialized applications.

Others: Growth is projected at 2.5%-4.5%. Niche uses in specialty chemicals maintain modest growth, with trends exploring DPO's versatility in industrial processes.

The heat transfer fluid segment leads, reflecting its critical role in industrial systems.

### Key Market Players

The DPO market is shaped by key producers.

Dow: A global leader, Dow supplies DPO for heat transfer fluids and solvents, meeting both internal and external demand.

Eastman Chemical: This firm provides DPO for industrial applications, focusing on performance and quality.

SI Group: An independent supplier, SI Group delivers DPO to the market without producing heat transfer fluids itself.

Jiangsu Zhongneng Chemical Technology Co. Ltd.: A new entrant, this Chinese company is building a 10,000-ton facility to supply China's heat transfer fluid producers.

### Porter's Five Forces Analysis

The DPO market's competitive landscape is influenced by:

Threat of New Entrants: Moderate. Technical barriers exist, but growing demand could attract niche players like Jiangsu Zhongneng.

Bargaining Power of Suppliers: Moderate. Raw material suppliers affect costs, though large producers mitigate this through scale.

Bargaining Power of Buyers: Moderate. Industrial buyers prioritize quality, but supplier concentration limits their leverage.

Threat of Substitutes: Moderate. Alternative heat transfer fluids compete, though DPO's unique properties sustain its position.

Industry Rivalry: Moderate. Competition among Dow, Eastman, and SI Group focuses on quality and capacity rather than price.

## Market Opportunities and Challenges

### Opportunities

Rising industrial demand for efficient heat transfer fluids fuels market growth, particularly in Asia-Pacific.

New capacity, such as Jiangsu Zhongneng's 10,000-ton project, enhances supply and market reach.

Innovations in high-temperature applications expand DPO's industrial relevance.

### Challenges

Competition from alternative heat transfer fluids and solvents limits growth potential.

Regulatory pressures on aromatic compounds increase compliance burdens.

Supply chain volatility impacts raw material availability and costs.

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