

Tetrabutylurea Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Tetrabutylurea Market Summary

Introduction

Tetrabutylurea (TBU) is a transparent liquid with a viscosity slightly higher than water, primarily employed as a solvent in the anthraquinone process for hydrogen peroxide production. When combined with trioctyl phosphate in specific ratios, TBU enhances hydroanthraquinone solubility, increases hydrogen peroxide's partition coefficient, and improves density and surface tension differences with water. Its adoption is driven by the expansion of hydrogen peroxide production, particularly in China, where rising caprolactam capacity and direct oxidation methods for propylene oxide fuel demand. Major global producers like Solvay, Evonik, and Nouryon rely on the anthraquinone auto-oxidation process, reinforcing TBU's significance. The market also serves pharmaceutical and niche industrial applications, with growth tied to trends towards larger, more efficient hydrogen peroxide plants.

Market Size and Growth Forecast

The global Tetrabutylurea market is expected to reach 50 to 90 million USD by 2025, with a compound annual growth rate (CAGR) of 2.1% to 3.5%. This growth is propelled by increasing hydrogen peroxide demand across industrial applications.

Regional Analysis

The market is concentrated in Asia Pacific, with China leading production and growth estimated at 2.5-4.0%. Europe and North America exhibit growth of 1.5-3.0%, driven by stable chemical industry demand, with key countries like China and Germany shaping trends.

Application Analysis

TBU's applications include:

Hydrogen Peroxide: Growth of 2.5-4.0%. The primary use, driven by expanding hydrogen peroxide production.

Pharmaceuticals: Projected growth of 1.5-3.0%. Used in specific processes, with steady demand.

Others: Growth estimated at 1.0-2.5%. Includes niche industrial uses with modest growth.

The trend towards high-efficiency hydrogen peroxide plants boosts TBU's prominence.

Key Market Players

Key producers include:

Yueyang Zhenxing Zhongshun New Material Technology: Supplies 3,000 tons, a significant market player.

Chongqing Changfeng Chemical Industrial Co. Ltd.: Offers a 1,400-ton capacity.

Quzhou Weirong Pharmaceutical & Chemical Co. Ltd.: The largest producer with 5,000 tons.

Atul: An Indian firm contributing to the market.

Huzhou Jichang Chemical Co. Ltd.: Supports global supply.

Porter's Five Forces Analysis

Threat of New Entrants: Low. High expertise and supply chain barriers limit entry.

Threat of Substitutes: Moderate. Alternative solvents exist but may not match TBU's performance.

Bargaining Power of Buyers: High. Hydrogen peroxide producers influence pricing due to market concentration.

Bargaining Power of Suppliers: Moderate. Raw material suppliers have some leverage, limited by market scale.

Competitive Rivalry: Moderate. Competition is primarily among Chinese producers.

Market Opportunities and Challenges

Opportunities:

Growth in hydrogen peroxide production, especially in China.

Export potential to other regions.

Challenges:

Reliance on hydrogen peroxide market growth.

Regulatory pressures on chemical production.

Competition from alternative solvents.

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