

Global Fluoropolymers Market: Analysis By Consumption, By Type (PTFE, PVDF, FEP, Fluoroelastomers, ETFE, PFA, and Others), By Application (Pipe, Tube, Film, Sheet, Roofing, Membrane, Additives, Sealant, and Others), By End User (Industrial Equipment, Automotive, Electrical and Electronics, Construction, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

Fluoropolymers are a class of synthetic polymers characterized by the presence of fluorine atoms in their molecular structure. They are mainly known for their broad temperature ranges, low friction, chemical resistance, electrical and mechanical insulation, low surface energy, and excellent thermal insulation properties. The global fluoropolymers market encompasses economic activities associated with production, distribution, and consumption of fluoropolymer materials and products, each tailored for specific application and industry. Fluoropolymers are in high demand, and China has been the leading consumer of these polymers globally. The global fluoropolymers market value stood at US\$8.17 billion in 2022, and is expected to reach US\$10.95 billion by 2028. Global fluoropolymers market consumption stood at 311.06 billion tonnes per annum in 2022.

Fluoropolymers are finding increased usage in automobiles, electrical and electronics and new energy applications like energy harvesting, sensors, 5G etc. due to higher chemical resistance, better insulation properties, and stability at wider range of temperature and pressure. Global fluoropolymers market demonstrated a consistent

growth, primarily driven by fast-paced growth of the aviation industry, increasing digitalization, growing demand for low weight and high resistant polymers in the industrial maintenance sector, increasing investments by regional governments in the Asia Pacific region for industrial development, rapidly expanding automotive sector, growing demand for flexible packaging solutions in food and beverage industries, and rise in number of research initiatives to fabricate an eco-friendlier fluoropolymer, etc. Furthermore, rapid industrialization, ongoing advancements in electronic component design, emerging market for melt-processable fluoropolymers, growing energy demand, and emerging applications such as photovoltaic modules and architectural membranes, etc., will continue to boost the growth of global fluoropolymers market in the upcoming years. The market is expected to grow at a CAGR of 5% over the projected period of 2023-2028.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the fluoropolymers market into seven segments based on type, namely, PTFE, PVDF, FEP, Fluoroelastomers, ETFE, PFA, and others. PTFE is the largest segment of global fluoropolymer market owing to increasing prevalence of non-stick cookware, rapidly growing chemical processing industries, low cost of PTFE in comparison to other HPF, growing demand for high-performance polymers in various industrial applications, rise in number of pickup trucks and small passenger cars, increasing infrastructure development in emerging economies, and emerging applications of PTFE in renewable energy, MEMS technology, water filtration membrane, and 3D printing. PFA is the fastest growing segment of global fluoropolymers market owing to increasing demand from various end user industries, surging digitalization, ongoing advancements in electronic component designing, rising government spending on infrastructure projects in developing economies, increasing awareness about the environmental benefits of using PFA fluoropolymers, rising investments in medical and pharmaceutical sectors, automotive industry's emphasis on lightweight materials for fuel efficiency, and PFAs unique material properties such as high-temperature stability, excellent electrical insulation, UV resistance, low extractables and purity, etc.

Similarly, on the basis of type, the global fluoropolymers market consumption can be divided into six segments, namely, PTFE, PVDF, FEP, ETFE, PFA, and others, where PTFE is the largest segment by consumption and PFA is the fastest segment.

By Application: The report provides the bifurcation of the fluoropolymers market into nine segments on the basis of application: pipe, tube, film, sheet, roofing, membrane,

additives, sealant, and others. Pipe is the largest segment of global fluoropolymers market as a result of rapid urbanization, increasing demand in oil and gas exploration, expansion of industrial infrastructure requiring reliable and durable piping systems, increased focus of government authorities on rural water management program, growing application in pharmaceutical and biotechnology sectors, and unique advantages of using PFA pipes in terms of chemical & corrosion resistance, temperature stability, durability and longevity, lightweight and flexible, etc.

By End User: The report provides the bifurcation of the fluoropolymers market into five segments on the basis of end user: industrial equipment, automotive, electrical and electronics, construction, and others. Industrial equipment is the largest segment of global fluoropolymer market as a result of increasing demand for high-performance plastics, growing awareness of industrial efficiency, rising trend of industrialization in emerging economies, aging infrastructure, increasing demand for chemical resistant materials, growing need for temperature resistant gaskets & energy pumps inner linings, and rising infrastructure development projects, such as construction of bridges, power plants, and other large-scale facilities.

By Region: The report provides insight into fluoropolymers market based on the regions namely, Europe, North America, Asia Pacific, and rest of the world. Asia Pacific is both the largest & fastest growing region of global fluoropolymers market, owing to rapid urbanization, rising middle-class population, burgeoning electronics and telecommunications sector, increasing foreign direct investment in countries such as Indonesia, Malaysia, and Thailand, improving standard of living, ongoing infrastructure development projects in countries such as China and India, and rising demand from various end user industries including pharmaceutical, construction, and electrical industries.

The Asia Pacific fluoropolymers market is divided into four regions on the basis of geographical operations, namely, China, Japan, India, and Rest of Asia Pacific, where China held the largest share in Asia Pacific fluoropolymers market owing to increasing investment in supply chain networks to ensure seamless manufacturing and distribution, the presence of highly advanced automotive production facilities, well established chemical sector, increasing government investment in industrial infrastructure, and rising demand for high-quality medical, automotive, and consumer electronics products. China also accounts for a significant proportion of both PTFE and other fluoropolymer global consumption. India is expected to be the fastest growing region as a result of growing healthcare industry, rapidly expanding e-commerce sector, increasing focus on green building initiatives, rising number of government initiatives like 'Smart Cities

Mission' & 'Make in India' fueling infrastructure development, and growing emphasis on self-reliance in the aerospace and defense sectors.

Market Dynamics:

Growth Drivers: The global fluoropolymers market has been rapidly growing over the past few years, due to factors such as rapidly growing automotive sector, increasing demand in electrical and electronics sector, surging application in medical sector, expansion of aerospace industry, rising need of fluoropolymers in various other end user industries, etc. Fluoropolymers are increasingly used in making fabrics, non-stick coatings for cookware, fuel hoses, gaskets, insulation materials in printed circuits and semiconductors, and fiberglass composites in construction works on account of their flame retardancy, thermal stability, weatherability, and friction properties. Also, in the construction industry, fluoropolymers are used in architectural coatings, sealants, and other applications where weather resistance and durability are essential. Furthermore, fluoropolymer coatings are applied to aircraft components, such as wings and engine components, to prevent the accumulation of ice as these coatings provide a low-friction surface that helps shed ice and improve aerodynamic performance. Therefore, rapidly growing aerospace industry, growing demand for fluoropolymers in various end user industries, and increasing use of fluoropolymers in newer applications such as dental ware, waterproof clothing, photovoltaic modules, and architectural membranes, among others, have been positively contributing to the positive growth of global fluoropolymers market over the years.

Challenges: However, the global fluoropolymer market growth would be negatively impacted by various challenges such as phasing out of PFAS and PFOA, high prices and limited access to key raw materials, etc. The prices of PTFE, a key raw material used in the production of fluoropolymers, are known to be volatile and subject to fluctuations. PTFE costs are steadily rising due to the closure of major manufacturing facilities in China and Europe. Fluorspar reserves are mainly concentrated in Mexico, China and South Africa which account for ~60% of global reserves (2022), and therefore, due to concentrated availability, fluorspar prices are very volatile and secured access is a key determinant for long-term sustainable business.

Trends: The global fluoropolymer market is projected to grow at a fast pace during the forecasted period, due to increasing demand of electric vehicles, developing 5G communication technology, ongoing advancements in fluoropolymer processing techniques, rising focus on sustainability, etc. Fluoropolymers are commonly utilized in the manufacturing of coatings for PCBs, dielectric materials for antennas, heat-resistant

materials for electronic components, and insulating materials for various components in 5G infrastructure. In addition, fluoropolymers are used in the manufacturing of miniaturized components and to protect them from moisture, UV radiation, and other environmental factors, and ensuring that these devices remain durable, efficient and reliable in various environmental conditions. Furthermore, advancements in micro-injection molding to produce small and intricate fluoropolymer components, and improved understanding of the rheological behavior of molten fluoropolymers for better control over the injection molding process, is expected to result in higher fluoropolymers market growth in the coming years.

Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. Lockdown policies imposed by the government to prevent virus spread forced various end user industries to either shut down or run low on production capacity, resulting in lower production and manufacturing activities by various end user industries and since end user industries demand fluoropolymers in various, there was a sudden fall in the demand of fluoropolymers chemical compounds, impeding the growth of the global fluoropolymers market during the period, 2019-2020. In addition, the aerospace industry experienced unprecedented challenges during the COVID-19 pandemic, jeopardizing the demand for fluoropolymers in the production of thermal insulation blankets, panels, coatings, and seat materials.

Competitive Landscape:

Global fluoropolymers market is moderately consolidated, with top players accounting for more than half of global market share in 2022. The key players of the global fluoropolymers market are:

Mitsubishi Chemical Group Corporation

The AGC Group

Daikin Industries, Ltd.

Honeywell International Inc.

Saint-Gobain S.A.

3M Company

DuPont de Nemours, Inc.

The Chemours Company

Gujarat Fluorochemicals Limited

Arkema Group (Arkema S.A.)
Dongyue Group
Syensqo
HaloPolymer, OJSC

Key players of the market are focusing on scalability, innovation, & sustainability by implementing eco-friendly manufacturing practices and developing fluoropolymers with reduced environmental impact. Market players are also focusing on expanding production capacities & global footprint to meet the growing demand for fluoropolymers across various end user industries. For instance, in 2022, Dongyue Group announced that the company has completed the construction of its PVDF project with a capacity of around 10,000 tons per year in China, and upon completion of this project, the company's total PVDF production capacity reached 25,000 tons/year.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Fluoropolymers: An Overview

2.1.1 Definition of Fluoropolymers

2.1.2 Features of Fluoropolymers

2.2 Properties and Usage of Various Fluoropolymers: An Overview

2.3 Fluoropolymers Segmentation: An Overview

2.3.1 Fluoropolymers Segmentation: An Overview

3. GLOBAL MARKET ANALYSIS

3.1 Global Fluoropolymers Market: An Analysis

3.1.1 Global Fluoropolymers Market: An Overview

3.1.2 Global Fluoropolymers Market by Value

3.1.3 Global Fluoropolymers Market by Type (PTFE, PVDF, FEP, Fluoroelastomers, ETFE, PFA, and Others)

3.1.4 Global Fluoropolymers Market by Application (Pipe, Tube, Film, Sheet, Roofing, Membrane, Additives, Sealant, and Others)

3.1.5 Global Fluoropolymers Market by End User (Industrial Equipment, Automotive, Electrical And Electronics, Construction, and Others)

3.1.6 Global Fluoropolymers Market by Region (North America, Europe, Asia Pacific, and Rest of the World)

3.1.7 Global Fluoropolymers Market by Consumption

3.1.8 Global Fluoropolymers Market Consumption by Type (PTFE, PVDF, FEP, ETFE, PFA, and others)

3.1.9 Global Fluoropolymers Market Consumption by Region (China, Europe, the US, Japan, Korea, India, and Others)

3.2 Global Fluoropolymers Market: Type Analysis

3.2.1 Global Fluoropolymers Market: Type Overview

3.2.2 Global PTFE Market by Value

3.2.3 Global PTFE Market by Consumption

3.2.4 Global PVDF Market by Value

3.2.5 Global PVDF Market by Consumption

3.2.6 Global FEP Market by Value

- 3.2.7 Global FEP Market by Consumption
- 3.2.8 Global Fluoroelastomers Market by Value
- 3.2.9 Global ETFE Market by Value
- 3.2.10 Global ETFE Market by Consumption
- 3.2.11 Global PFA Market by Value
- 3.2.12 Global PFA Market by Consumption
- 3.2.13 Global Others Fluoropolymers Market by Value
- 3.2.14 Global Others Fluoropolymers Market by Consumption
- 3.3 Global Fluoropolymers Market: Application Analysis
 - 3.3.1 Global Fluoropolymers Market: Application Overview
 - 3.3.2 Global Pipe Fluoropolymers Market by Value
 - 3.3.3 Global Tube Fluoropolymers Market by Value
 - 3.3.4 Global Film Fluoropolymers Market by Value
 - 3.3.5 Global Sheet Fluoropolymers Market by Value
 - 3.3.6 Global Roofing Fluoropolymers Market by Value
 - 3.3.7 Global Membrane Fluoropolymers Market by Value
 - 3.3.8 Global Additives Fluoropolymers Market by Value
 - 3.3.9 Global Sealant Fluoropolymers Market by Value
 - 3.3.10 Global Others Fluoropolymers Market by Value
- 3.4 Global Fluoropolymers Market: End User Analysis
 - 3.4.1 Global Fluoropolymers Market: End User Overview
 - 3.4.2 Global Industrial Equipment Fluoropolymers Market by Value
 - 3.4.3 Global Automotive Fluoropolymers Market by Value
 - 3.4.4 Global Electrical and Electronics Fluoropolymers Market by Value
 - 3.4.5 Global Construction Fluoropolymers Market by Value
 - 3.4.6 Global Others Fluoropolymers Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 Asia Pacific Fluoropolymers Market: An Analysis
 - 4.1.1 Asia Pacific Fluoropolymers Market: An Overview
 - 4.1.2 Asia Pacific Fluoropolymers Market by Value
 - 4.1.3 Asia Pacific Fluoropolymers Market by Region (China, Japan, India, and Rest of Asia Pacific)
 - 4.1.4 China Fluoropolymers Market by Value
 - 4.1.5 Japan Fluoropolymers Market by Value
 - 4.1.6 India Fluoropolymers Market by Value
 - 4.1.7 Rest of Asia Pacific Fluoropolymers Market by Value
- 4.2 North America Fluoropolymers Market: An Analysis

- 4.2.1 North America Fluoropolymers Market: An Overview
- 4.2.2 North America Fluoropolymers Market by Value
- 4.2.3 North America Fluoropolymers Market by Region (The US, Canada, and Mexico)
- 4.2.4 The US Fluoropolymers Market by Value
- 4.2.5 Mexico Fluoropolymers Market by Value
- 4.2.6 Canada Fluoropolymers Market by Value
- 4.3 Europe Fluoropolymers Market: An Analysis
 - 4.3.1 Europe Fluoropolymers Market: An Overview
 - 4.3.2 Europe Fluoropolymers Market by Value
 - 4.3.3 Europe Fluoropolymers Market by Region (Germany, France, Italy, UK, and Rest of Europe)
 - 4.3.4 Germany Fluoropolymers Market by Value
 - 4.3.5 France Fluoropolymers Market by Value
 - 4.3.6 Italy Fluoropolymers Market by Value
 - 4.3.7 UK Fluoropolymers Market by Value
 - 4.3.8 Rest of Europe Fluoropolymers Market by Value
- 4.4 Rest of the World Fluoropolymers Market: An Analysis
 - 4.4.1 Rest of the World Fluoropolymers Market: An Overview
 - 4.4.2 Rest of the World Fluoropolymers Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19 on Fluoropolymers Market
- 5.2 Post COVID-19 Impact on Fluoropolymers Market

6. MARKET DYNAMICS

- 6.1 Growth Drivers
 - 6.1.1 Rapidly Growing Automotive Sector
 - 6.1.2 Increasing Demand in Electrical and Electronics Sector
 - 6.1.3 Surging Application in Medical Sector
 - 6.1.4 Expansion of Aerospace Industry
 - 6.1.5 Rising Need of Fluoropolymers in Various Other End User Industries
- 6.2 Challenges
 - 6.2.1 Phasing out of PFAS and PFOA
 - 6.2.2 High Prices and Limited Access To Key Raw Materials
- 6.3 Market Trends
 - 6.3.1 Increasing Demand of Electric Vehicles
 - 6.3.2 Developing 5G Communication Technology

6.3.3 Ongoing Advancements In Fluoropolymer Processing Techniques

6.3.4 Rising Focus On Sustainability

7. COMPETITIVE LANDSCAPE

7.1 Global Fluoropolymers Market: Competitive Landscape

7.2 Global Fluoropolymers Players by Market Share

7.3 Global Fluoropolymers Market: Product Comparison

8. COMPANY PROFILES

8.1 Mitsubishi Chemical Group Corporation

8.1.1 Business Overview

8.1.2 Operating Segments

8.1.3 Business Strategy

8.2 The AGC Group

8.2.1 Business Overview

8.2.2 Operating Segments

8.2.3 Business Strategy

8.3 Daikin Industries, Ltd.

8.3.1 Business Overview

8.3.2 Operating Segments

8.3.3 Business Strategy

8.4 Honeywell International Inc.

8.4.1 Business Overview

8.4.2 Operating Segments

8.4.3 Business Strategy

8.5 Saint-Gobain S.A.

8.5.1 Business Overview

8.5.2 Operating Segments

8.5.3 Business Strategy

8.6 3M Company

8.6.1 Business Overview

8.6.2 Operating Segments

8.6.3 Business Strategy

8.7 DuPont de Nemours, Inc.

8.7.1 Business Overview

8.7.2 Operating Segments

8.7.3 Business Strategies

- 8.8 The Chemours Company
 - 8.8.1 Business Overview
 - 8.8.2 Operating Segments
 - 8.8.3 Business Strategies
- 8.9 Gujarat Fluorochemicals Limited
 - 8.9.1 Business Overview
 - 8.9.2 Revenue by Geographical Region
 - 8.9.3 Business Strategies
- 8.10 Arkema Group (Arkema S.A.)
 - 8.10.1 Business Overview
 - 8.10.2 Operating Segments
 - 8.10.3 Business Strategy
- 8.11 Dongyue Group
 - 8.11.1 Business Overview
 - 8.11.2 Operating Segments
- 8.12 Syensqo
 - 8.12.1 Business Overview
 - 8.12.2 Business Strategies
- 8.13 HaloPolymer, OJSC
 - 8.13.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Features of Fluoropolymers

Figure 2: Fluoropolymers Segmentation

Figure 3: Global Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)

Figure 4: Global Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 5: Global Fluoropolymers Market by Type; 2022 (Percentage, %)

Figure 6: Global Fluoropolymers Market by Application; 2022 (Percentage, %)

Figure 7: Global Fluoropolymers Market by End User; 2022 (Percentage, %)

Figure 8: Global Fluoropolymers Market by Region; 2022 (Percentage, %)

Figure 9: Global Fluoropolymers Market by Consumption; 2022-2028 (Billion Tonnes Per Annum)

Figure 10: Global Fluoropolymers Market Consumption by Type; 2022 (Percentage, %)

Figure 11: Global Fluoropolymers Market Consumption by Region; 2022 (Percentage, %)

Figure 12: Global PTFE Market by Value; 2018-2022 (US\$ Billion)

Figure 13: Global PTFE Market by Value; 2023-2028 (US\$ Billion)

Figure 14: Global PTFE Market by Consumption; 2022-2028 (Billion Tonnes Per Annum)

Figure 15: Global PVDF Market by Value; 2018-2022 (US\$ Billion)

Figure 16: Global PVDF Market by Value; 2023-2028 (US\$ Billion)

Figure 17: Global PVDF Market by Consumption; 2022-2028 (Billion Tonnes Per Annum)

Figure 18: Global FEP Market by Value; 2018-2022 (US\$ Million)

Figure 19: Global FEP Market by Value; 2023-2028 (US\$ Million)

Figure 20: Global FEP Market by Consumption; 2022-2028 (Billion Tonnes Per Annum)

Figure 21: Global Fluoroelastomers Market by Value; 2018-2022 (US\$ Million)

Figure 22: Global Fluoroelastomers Market by Value; 2023-2028 (US\$ Million)

Figure 23: Global ETFE Market by Value; 2018-2022 (US\$ Million)

Figure 24: Global ETFE Market by Value; 2023-2028 (US\$ Million)

Figure 25: Global ETFE Market by Consumption; 2022-2028 (Billion Tonnes Per Annum)

Figure 26: Global PFA Market by Value; 2018-2022 (US\$ Million)

Figure 27: Global PFA Market by Value; 2023-2028 (US\$ Million)

Figure 28: Global PFA Market by Consumption; 2022-2028 (Billion Tonnes Per Annum)

Figure 29: Global Others Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)

Figure 30: Global Others Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 31: Global Others Fluoropolymers Market by Consumption; 2022-2028 (Billion Tonnes Per Annum)

Figure 32: Global Pipe Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)

Figure 33: Global Pipe Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 34: Global Tube Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)

Figure 35: Global Tube Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 36: Global Film Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)

Figure 37: Global Film Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 38: Global Sheet Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)

Figure 39: Global Sheet Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 40: Global Roofing Fluoropolymers Market by Value; 2018-2022 (US\$ Million)

Figure 41: Global Roofing Fluoropolymers Market by Value; 2023-2028 (US\$ Million)

Figure 42: Global Membrane Fluoropolymers Market by Value; 2018-2022 (US\$ Million)

Figure 43: Global Membrane Fluoropolymers Market by Value; 2023-2028 (US\$ Million)

Figure 44: Global Additives Fluoropolymers Market by Value; 2018-2022 (US\$ Million)

Figure 45: Global Additives Fluoropolymers Market by Value; 2023-2028 (US\$ Million)

Figure 46: Global Sealant Fluoropolymers Market by Value; 2018-2022 (US\$ Million)

Figure 47: Global Sealant Fluoropolymers Market by Value; 2023-2028 (US\$ Million)

Figure 48: Global Others Fluoropolymers Market by Value; 2018-2022 (US\$ Million)

Figure 49: Global Others Fluoropolymers Market by Value; 2023-2028 (US\$ Million)

Figure 50: Global Industrial Equipment Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)

Figure 51: Global Industrial Equipment Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 52: Global Automotive Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)

Figure 53: Global Automotive Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 54: Global Electrical and Electronics Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)

Figure 55: Global Electrical and Electronics Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 56: Global Construction Fluoropolymers Market by Value; 2018-2022 (US\$ Million)

Figure 57: Global Construction Fluoropolymers Market by Value; 2023-2028 (US\$ Million)

Figure 58: Global Others Fluoropolymers Market by Value; 2018-2022 (US\$ Million)

Figure 59: Global Others Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 60: Asia Pacific Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)

Figure 61: Asia Pacific Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)

Figure 62: Asia Pacific Fluoropolymers Market by Region; 2022 (Percentage, %)

- Figure 63: China Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)
- Figure 64: China Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)
- Figure 65: Japan Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 66: Japan Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 67: India Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 68: India Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 69: Rest of Asia Pacific Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 70: Rest of Asia Pacific Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 71: North America Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)
- Figure 72: North America Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)
- Figure 73: North America Fluoropolymers Market by Region; 2022 (Percentage, %)
- Figure 74: The US Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)
- Figure 75: The US Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)
- Figure 76: Mexico Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 77: Mexico Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 78: Canada Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 79: Canada Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 80: Europe Fluoropolymers Market by Value; 2018-2022 (US\$ Billion)
- Figure 81: Europe Fluoropolymers Market by Value; 2023-2028 (US\$ Billion)
- Figure 82: Europe Fluoropolymers Market by Region; 2022 (Percentage, %)
- Figure 83: Germany Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 84: Germany Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 85: France Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 86: France Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 87: Italy Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 88: Italy Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 89: UK Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 90: UK Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 91: Rest of Europe Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 92: Rest of Europe Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 93: Rest of the World Fluoropolymers Market by Value; 2018-2022 (US\$ Million)
- Figure 94: Rest of the World Fluoropolymers Market by Value; 2023-2028 (US\$ Million)
- Figure 95: Global Automotive Manufacturing Industry Revenue; 2019-2023 (US\$ Trillion)
- Figure 96: Global Consumer Electronics Market Revenue; 2019-2025 (US\$ Billion)
- Figure 97: Global Electric Car Sales; 2019–2023 (Million)
- Figure 98: Global Fluoropolymers Players by Market Share; 2022 (Percentage, %)

Figure 99: Mitsubishi Chemical Group Corporation Revenue by Segments; 2022
(Percentage, %)

Figure 100: The AGC Group Net Sales by Segments; 2022 (Percentage, %)

Figure 101: Daikin Industries, Ltd. Revenue by Segment; 2022 (Percentage, %)

Figure 102: Honeywell International Inc. Net Sales by Segment; 2022 (Percentage, %)

Figure 103: Saint-Gobain S.A. Sales by Segment; 2022 (Percentage, %)

Figure 104: 3M Company Net Sales by Segment; 2022 (Percentage, %)

Figure 105: DuPont de Nemours, Inc. Net Revenue by Segments; 2022 (Percentage, %)

Figure 106: The Chemours Company Net Sales by Segments, 2022 (Percentage, %)

Figure 107: Gujarat Fluorochemicals Limited Revenue by Geographical Region, 2023
(Percentage, %)

Figure 108: Arkema Sales by Segment; 2022 (Percentage, %)

Figure 109: Dongyue Group Revenue by Segments; 2022 (Percentage, %)

Table 1: Properties and Usage of Various Fluoropolymers

Table 2: Global Fluoropolymers Market Product Comparison

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