

Global Medical-grade Perfluorobutylpentane Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Medical-grade Perfluorobutylpentane market size is expected to reach \$ 50.96 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

Medical-grade perfluorobutylpentane, commonly referred to as F4H5, is a clear and colorless semifluorinated alkane composed of a perfluorobutyl segment and a pentyl segment. Its low surface tension, strong spreading properties, amphiphilic character, and ability to dissolve silicone oil and selected lipophilic drugs make it suitable primarily as a water-free ophthalmic drug-delivery vehicle and as a sterile medical liquid for removing silicone oil residues and cleaning intraocular lenses during vitreoretinal procedures. Key upstream inputs include high-purity fluorinated organic intermediates, carbon-chain coupling materials, high-purity solvents and process gases, together with distillation and purification capacity, trace-impurity control, sterile filtration, cleanroom filling, and pharmaceutical packaging components. Major downstream customers include ophthalmic pharmaceutical companies, ophthalmic medical-device manufacturers, sterile drug-product CDMOs, hospitals, and specialist eye centers. Under the narrow medical-material scope, estimated global effective capacity was approximately 2,600 kg/yr in 2025, while sales volume was approximately 1,763 kg, corresponding to capacity utilization of about 67.8%. The weighted average ex-factory price was approximately USD 15,768 per kg, and the typical industry gross margin ranged from 40% to 60%.

The global medical-grade perfluorobutylpentane market remains a highly specialized ophthalmic materials segment characterized by a small number of qualified suppliers, a limited commercial product portfolio, and substantial technical and regulatory barriers. Current commercial demand is concentrated in two principal routes: pure F4H5 surgical

washout liquids and water-free cyclosporine ophthalmic solutions. The value chain is divided among technology owners, raw-material suppliers, sterile formulation manufacturers, CDMOs, marketing authorization holders, and commercial distributors. The synthesis process, impurity profile, and pharmaceutical quality documentation for F4H5 are generally confidential, and changing the excipient source in an approved drug may require additional quality, stability, and regulatory comparability work. Suppliers already qualified within approved ophthalmic products therefore benefit from meaningful switching barriers and durable customer relationships. The principal demand driver is the geographic expansion of water-free ophthalmic drug-delivery technology. F4H5 can dissolve hydrophobic compounds such as cyclosporine and enables a clear, non-aqueous ophthalmic solution without conventional surfactants or antimicrobial preservatives. VEVYE is commercially available in the United States, Vevizye has been approved in the European Union, and Heng Yi received approval in China in 2026. These developments are shifting F4H5 from a narrowly used vitreoretinal surgical material toward a pharmaceutical excipient with commercial demand across several major healthcare markets. Future growth will depend primarily on prescription adoption, European and Chinese launches, and the ability of EyeSol-type platforms to deliver additional lipophilic ophthalmic drugs, rather than solely on growth in silicone-oil removal procedures. Technology development will increasingly focus on high-purity manufacturing, control of fluorinated process impurities, extremely low moisture levels, sterility assurance, and compatibility with primary packaging rather than on nominal assay alone. The FDA quality review of the F4H5-containing cyclosporine product addressed identity, related substances, visible and sub-visible particles, sterility, and extractables and leachables from the container-closure system, demonstrating that commercialization requires integrated development of the material, formulation, filling process, and packaging. F4H5 may also be evaluated as a carrier for tacrolimus, anti-inflammatory agents, glaucoma therapies, and other poorly water-soluble ophthalmic compounds. However, translation from laboratory research to commercial products will require formulation stability, ocular tolerability, long-term safety, and scalable non-aqueous sterile filling. CDMOs combining analytical, sterile manufacturing, and ophthalmic packaging capabilities are therefore expected to become increasingly important. Major constraints include the small overall demand base, concentrated supply, limited transparency regarding excipient sourcing, long pharmaceutical development timelines, and increasing scrutiny of environmentally persistent fluorinated substances. The EMA concluded that available non-clinical data did not indicate a particular human safety hazard from the perfluorobutylpentane excipient, but its environmental assessment identified a potential for persistence. Future requirements covering manufacturing emissions, waste-liquid management, product disposal, and fluorinated-substance regulation may therefore increase compliance costs. F4H5-based

products must also compete with conventional cyclosporine emulsions, alternative anti-inflammatory eye drops, and other dry-eye treatment mechanisms. The market is consequently more likely to expand steadily around a small number of high-value ophthalmic applications than to develop into a high-volume commodity chemical sector, favoring suppliers with complete regulatory documentation, secure long-term supply, and credible environmental management systems.

This report studies the global Medical-grade Perfluorobutylpentane production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Medical-grade Perfluorobutylpentane 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 Medical-grade Perfluorobutylpentane that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Medical-grade Perfluorobutylpentane total production and demand, 2021-2032, (kg)

Global Medical-grade Perfluorobutylpentane total production value, 2021-2032, (USD Million)

Global Medical-grade Perfluorobutylpentane production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Medical-grade Perfluorobutylpentane consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: Medical-grade Perfluorobutylpentane domestic production, consumption, key domestic manufacturers and share

Global Medical-grade Perfluorobutylpentane production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Medical-grade Perfluorobutylpentane production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Medical-grade Perfluorobutylpentane production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Medical-grade Perfluorobutylpentane 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 Geuder, Siegfried, HWI Group, Hengrui Pharma, 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 Medical-grade Perfluorobutylpentane market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/kg) 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 Medical-grade Perfluorobutylpentane Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Medical-grade Perfluorobutylpentane Market, Segmentation by Type:

Pharmaceutical Excipient Grade

Sterile Surgical Grade

Other

Global Medical-grade Perfluorobutylpentane Market, Segmentation by Product Form:

Bulk Liquid

Sterile Single-use Vial

Other

Global Medical-grade Perfluorobutylpentane Market, Segmentation by Application:

Ophthalmic Pharmaceutical Companies

Pharmaceutical CDMOs

Other

Companies Profiled:

Geuder

Siegfried

HWI Group

Hengrui Pharma

Key Questions Answered:

1. How big is the global Medical-grade Perfluorobutylpentane market?
2. What is the demand of the global Medical-grade Perfluorobutylpentane market?
3. What is the year over year growth of the global Medical-grade Perfluorobutylpentane market?
4. What is the production and production value of the global Medical-grade

Perfluorobutylpentane market?

5. Who are the key producers in the global Medical-grade Perfluorobutylpentane market?

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

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