

Global Fluorinated Active Pharmaceutical Ingredients Market Growth 2026-2032

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Abstracts

The global Fluorinated Active Pharmaceutical Ingredients market size is predicted to grow from US\$ 5459 million in 2025 to US\$ 8905 million in 2032; it is expected to grow at a CAGR of 7.4% from 2026 to 2032.

Fluorinated Active Pharmaceutical Ingredients (Fluorinated APIs) are small-molecule active pharmaceutical ingredients whose final molecular structures contain at least one covalently bound fluorine atom or fluorine-containing functional group. Typical structural features include C–F, CF₃, CF₂H and OCF₃ groups, while products can be classified as monofluorinated or polyfluorinated APIs according to fluorine content. Manufacturing routes include direct or selective fluorination, nucleophilic and electrophilic fluorination, trifluoromethylation, fluorinated building-block incorporation and multistep organic synthesis. The market covers commercial and development-stage APIs used primarily in oncology, anti-infectives, central nervous system disorders, metabolic and endocrine diseases, cardiovascular diseases and respiratory diseases. From a supply perspective, the market includes merchant API production, contract manufacturing and captive manufacturing, while manufacturing requirements vary significantly between conventional APIs and high-potency APIs; in this study, an OEL of 10 µg/m³ is used as the reference boundary for high-potency classification. The scope focuses on the manufacturing value of fluorinated small-molecule APIs and reflects the commercial contribution of both established generic molecules and higher-value innovative drug substances.

Key Findings The overall gross margin of the fluorinated API industry was approximately 30%–40% in 2025. Innovative drugs are becoming an increasingly important source of demand growth for fluorinated APIs. China and India hold clear advantages in the production of mature fluorinated APIs. Some high potency fluorinated API facilities have

achieved OEL containment capabilities of 1–10 µg/m³.

Market Trends

The central structural trend is the continued use of fluorine to optimize potency, target selectivity, metabolic stability, lipophilicity and pharmacokinetic performance in small-molecule drug discovery. The high incidence of fluorinated structures among 2025 U.S. small-molecule approvals reinforces the view that fluorine chemistry is becoming more important at the innovation end of the market rather than being driven solely by mature fluoroquinolone or antifungal APIs.

At the manufacturing level, the industry is moving toward integrated development-to-commercialization platforms. Suppliers with expertise in fluorination, low-temperature chemistry, high-potency handling and process intensification are increasingly able to participate earlier in clinical development and retain projects into commercial manufacturing. AGC, for example, publicly describes fluorination capabilities spanning laboratory development through commercial-scale GMP API manufacturing, with reactors of up to 15,000 liters at its Chiba facility.

Market Dynamics

Drivers

The main demand driver is the sustained incorporation of fluorinated motifs into innovative small-molecule candidates. Oncology, CNS, anti-infective and other targeted therapies increasingly use fluorinated aromatic, heteroaromatic and fluoroalkyl structures to improve drug-like properties. At the same time, the existing installed base of generic fluorinated APIs provides a stable commercial foundation, creating a two-layer market in which mature-volume products coexist with smaller-volume, higher-value innovative APIs.

Restraints

Price erosion in mature generic APIs remains the principal structural restraint. Products such as fluoroquinolone, antifungal and older antiviral APIs face intense competition among Asian manufacturers, while process maturity allows continuous cost reduction. In addition, fluorination can involve corrosive, toxic or highly reactive reagents, requiring specialized equipment, waste treatment, occupational exposure management and regulatory compliance. These requirements can raise capital intensity and limit the

number of qualified suppliers for complex projects.

Opportunities

The strongest opportunities are concentrated in innovative fluorinated APIs, high-potency compounds and customized CDMO manufacturing. Suppliers capable of combining fluorination chemistry with GMP process development, containment, analytical development and commercial-scale production can capture a greater share of project value. The expansion of clinical pipelines containing fluorinated structures also creates opportunities for manufacturers that can support gram- and kilogram-scale development and subsequently scale projects into commercial production.

Challenges

The industry faces substantial project-level uncertainty because many innovative APIs are manufactured under confidentiality agreements and may not progress from clinical development to commercialization. Supply-chain qualification is also demanding: pharmaceutical customers typically require regulatory documentation, reproducible impurity control, stable fluorinated raw-material supply and robust environmental and safety management. For high-potency products, facility compatibility and occupational exposure limits further restrict manufacturing flexibility.

Industry Chain Analysis

The upstream chain consists of fluorine-containing raw materials, fluorinating agents, specialty fluorinated building blocks, catalysts and other organic synthesis inputs. Midstream manufacturers convert these materials through multistep synthesis into GMP-grade APIs, with production routes potentially involving fluorination, coupling, hydrogenation, crystallization, purification, micronization and high-containment operations. Downstream demand comes from innovative pharmaceutical companies, generic drug manufacturers and formulation producers across multiple therapeutic areas. The key industrial boundary is the transition from pharmaceutical intermediates to the final active ingredient: companies supplying only fluorinated intermediates or reagents belong upstream of the fluorinated API manufacturing market.

Value Chain Analysis

Value creation rises substantially as the product moves from standard fluorinated building blocks toward registered or customer-specific APIs. Mature merchant APIs compete primarily through cost, process yield, regulatory filings, scale and supply

reliability, whereas innovative and high-potency APIs derive more value from process intellectual property, impurity control, containment capabilities, regulatory experience and long-term customer integration. Commercial CDMO projects therefore generally carry higher technical barriers than standardized generic API production, although project concentration and customer dependence can also be higher.

Segment Insights

By therapeutic area, oncology and anti-infectives represent two of the most strategically important segments: oncology is increasingly associated with complex, high-value fluorinated molecules, while anti-infectives include several established large-volume fluorinated APIs. CNS, metabolic and endocrine, cardiovascular and respiratory applications provide additional demand diversification. By fluorination degree, both monofluorinated and polyfluorinated APIs are established categories, with polyfluorinated structures increasingly prominent in modern medicinal chemistry. By potency, high-potency APIs with an OEL of $\geq 10 \mu\text{g}/\text{m}^3$ require more stringent containment than conventional APIs, making manufacturing capability an important basis for supplier differentiation. AGC publicly identifies high-potency API capability in the 1–10 $\mu\text{g}/\text{m}^3$ OEL range, supporting this segmentation boundary.

Downstream Market Opportunities

Innovative oncology, targeted therapies, CNS drugs and next-generation anti-infectives offer the most attractive downstream opportunities because fluorination is frequently used to improve selectivity, stability and bioavailability in these programs. The 2025 new-drug cohort demonstrates that fluorinated structures are not concentrated in a single therapeutic field but span kinase inhibitors, receptor and enzyme modulators, ion-channel drugs and anti-infective agents. This diversity reduces dependence on any single downstream disease category and supports demand for flexible multipurpose API facilities rather than narrowly dedicated production lines.

Regional Insights

Asia is the principal manufacturing base for mature and generic fluorinated APIs, with China and India benefiting from established fine-chemical supply chains, API production infrastructure and broad pharmaceutical customer networks. Europe and Japan have stronger relative positions in complex process chemistry, regulated CDMO manufacturing and high-value customized APIs. Japanese production platforms demonstrate substantial fluorination and GMP capabilities, while European suppliers are

particularly active in complex small-molecule and high-potency manufacturing. North America remains an important center of innovative drug demand and pharmaceutical R&D, but the number of independent specialized fluorinated API manufacturers is comparatively smaller than the broader pharmaceutical customer base.

Competitive Landscape Analysis

Regional competition reflects a clear division between scale-oriented and technology-oriented supply. Chinese and Indian manufacturers are more prominent in mature APIs, generic supply and cost-efficient commercial production, while European and Japanese manufacturers tend to compete through complex fluorination chemistry, regulatory track records, containment capability and integrated CDMO services. Commercial API plants can reach significant industrial scale; for example, a European manufacturing platform publicly reports two FDA- and EMA-approved commercial API sites, approximately 350 m³ of total reactor volume and annual API capacity exceeding 400 metric tons.

Competitive advantage is therefore increasingly determined not simply by fluorine chemistry expertise, but by the ability to combine chemistry, GMP execution, scale-up, regulatory compliance and secure commercial supply.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Fluorinated Active Pharmaceutical Ingredients Industry Forecast” looks at past sales and reviews total world Fluorinated Active Pharmaceutical Ingredients sales in 2025, providing a comprehensive analysis by region and market sector of projected Fluorinated Active Pharmaceutical Ingredients sales for 2026 through 2032. With Fluorinated Active Pharmaceutical Ingredients sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Fluorinated Active Pharmaceutical Ingredients industry.

This Insight Report provides a comprehensive analysis of the global Fluorinated Active Pharmaceutical Ingredients landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Fluorinated Active Pharmaceutical Ingredients portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Fluorinated Active Pharmaceutical Ingredients market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Fluorinated Active Pharmaceutical Ingredients and breaks down the forecast by Degree of Fluorination, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Fluorinated Active Pharmaceutical Ingredients.

This report presents a comprehensive overview, market shares, and growth opportunities of Fluorinated Active Pharmaceutical Ingredients market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Degree of Fluorination:

Monofluorinated APIs

Polyfluorinated APIs

Segmentation by Drug Market Status:

Innovator and Patent-protected APIs

Off-patent and Generic APIs

Segmentation by Potency Classification:

High Potency APIs (OEL $\leq 10 \mu\text{g}/\text{m}^3$)

Conventional APIs (OEL $> 10 \mu\text{g}/\text{m}^3$)

Segmentation by Application:

Oncology

Anti-infectives

Central Nervous System

Metabolic and Endocrine Diseases

Cardiovascular Diseases

Respiratory Diseases

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Dr. Reddy's Laboratories Limited

AGC Inc.

Navin Fluorine International Limited

Orion Corporation

Aurobindo Pharma Limited

Laurus Labs Limited

Micro Labs Limited

Mangalam Drugs and Organics Limited

Aurore Life Sciences Private Limited

Styrax Pharma Private Limited

BDR Pharmaceuticals International Pvt. Ltd.

Viva Biotech Holdings

Zhejiang Jiuzhou Pharmaceutical Co., Ltd.

Shanghai Desano Pharmaceutical Group Co., Ltd.

Zhejiang Jingxin Pharmaceutical Co., Ltd.

Zhejiang East Asia Pharmaceutical Co., Ltd.

Fluoropharm Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Fluorinated Active Pharmaceutical Ingredients market?

What factors are driving Fluorinated Active Pharmaceutical Ingredients market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Fluorinated Active Pharmaceutical Ingredients market opportunities vary by end market size?

How does Fluorinated Active Pharmaceutical Ingredients break out by Degree of Fluorination, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Fluorinated Active Pharmaceutical Ingredients Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Fluorinated Active Pharmaceutical Ingredients by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Fluorinated Active Pharmaceutical Ingredients by Country/Region, 2021, 2025 & 2032

2.2 Fluorinated Active Pharmaceutical Ingredients Segment by Degree of Fluorination

- 2.2.1 Monofluorinated APIs
- 2.2.2 Polyfluorinated APIs
- 2.2.3 Fluorinated Active Pharmaceutical Ingredients Sales by Degree of Fluorination
 - 2.2.3.1 Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Degree of Fluorination (2021-2026)
 - 2.2.3.2 Global Fluorinated Active Pharmaceutical Ingredients Revenue and Market Share by Degree of Fluorination (2021-2026)
 - 2.2.3.3 Global Fluorinated Active Pharmaceutical Ingredients Sale Price by Degree of Fluorination (2021-2026)

2.3 Fluorinated Active Pharmaceutical Ingredients Segment by Drug Market Status

- 2.3.1 Innovator and Patent-protected APIs
- 2.3.2 Off-patent and Generic APIs
- 2.3.3 Fluorinated Active Pharmaceutical Ingredients Sales by Drug Market Status
 - 2.3.3.1 Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Drug Market Status (2021-2026)
 - 2.3.3.2 Global Fluorinated Active Pharmaceutical Ingredients Revenue and Market Share by Drug Market Status (2021-2026)

2.3.3.3 Global Fluorinated Active Pharmaceutical Ingredients Sale Price by Drug Market Status (2021-2026)

2.4 Fluorinated Active Pharmaceutical Ingredients Segment by Potency Classification

2.4.1 High Potency APIs (OEL ≤ 10 $\mu\text{g}/\text{m}^3$)

2.4.2 Conventional APIs (OEL >10 $\mu\text{g}/\text{m}^3$)

2.4.3 Fluorinated Active Pharmaceutical Ingredients Sales by Potency Classification

2.4.3.1 Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Potency Classification (2021-2026)

2.4.3.2 Global Fluorinated Active Pharmaceutical Ingredients Revenue and Market Share by Potency Classification (2021-2026)

2.4.3.3 Global Fluorinated Active Pharmaceutical Ingredients Sale Price by Potency Classification (2021-2026)

2.5 Fluorinated Active Pharmaceutical Ingredients Segment by Application

2.5.1 Oncology

2.5.2 Anti-infectives

2.5.3 Central Nervous System

2.5.4 Metabolic and Endocrine Diseases

2.5.5 Cardiovascular Diseases

2.5.6 Respiratory Diseases

2.5.7 Others

2.5.8 Fluorinated Active Pharmaceutical Ingredients Sales by Application

2.5.8.1 Global Fluorinated Active Pharmaceutical Ingredients Sale Market Share by Application (2021-2026)

2.5.8.2 Global Fluorinated Active Pharmaceutical Ingredients Revenue and Market Share by Application (2021-2026)

2.5.8.3 Global Fluorinated Active Pharmaceutical Ingredients Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Fluorinated Active Pharmaceutical Ingredients Breakdown Data by Company

3.1.1 Global Fluorinated Active Pharmaceutical Ingredients Annual Sales by Company (2021-2026)

3.1.2 Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Company (2021-2026)

3.2 Global Fluorinated Active Pharmaceutical Ingredients Annual Revenue by Company (2021-2026)

3.2.1 Global Fluorinated Active Pharmaceutical Ingredients Revenue by Company (2021-2026)

3.2.2 Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Company (2021-2026)

3.3 Global Fluorinated Active Pharmaceutical Ingredients Sale Price by Company

3.4 Key Manufacturers Fluorinated Active Pharmaceutical Ingredients Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Fluorinated Active Pharmaceutical Ingredients Product Location Distribution

3.4.2 Players Fluorinated Active Pharmaceutical Ingredients Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR FLUORINATED ACTIVE PHARMACEUTICAL INGREDIENTS BY GEOGRAPHIC REGION

4.1 World Historic Fluorinated Active Pharmaceutical Ingredients Market Size by Geographic Region (2021-2026)

4.1.1 Global Fluorinated Active Pharmaceutical Ingredients Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Fluorinated Active Pharmaceutical Ingredients Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Fluorinated Active Pharmaceutical Ingredients Market Size by Country/Region (2021-2026)

4.2.1 Global Fluorinated Active Pharmaceutical Ingredients Annual Sales by Country/Region (2021-2026)

4.2.2 Global Fluorinated Active Pharmaceutical Ingredients Annual Revenue by Country/Region (2021-2026)

4.3 Americas Fluorinated Active Pharmaceutical Ingredients Sales Growth

4.4 APAC Fluorinated Active Pharmaceutical Ingredients Sales Growth

4.5 Europe Fluorinated Active Pharmaceutical Ingredients Sales Growth

4.6 Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales Growth

5 AMERICAS

5.1 Americas Fluorinated Active Pharmaceutical Ingredients Sales by Country

5.1.1 Americas Fluorinated Active Pharmaceutical Ingredients Sales by Country (2021-2026)

5.1.2 Americas Fluorinated Active Pharmaceutical Ingredients Revenue by Country (2021-2026)

5.2 Americas Fluorinated Active Pharmaceutical Ingredients Sales by Degree of Fluorination (2021-2026)

5.3 Americas Fluorinated Active Pharmaceutical Ingredients Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Fluorinated Active Pharmaceutical Ingredients Sales by Region

6.1.1 APAC Fluorinated Active Pharmaceutical Ingredients Sales by Region (2021-2026)

6.1.2 APAC Fluorinated Active Pharmaceutical Ingredients Revenue by Region (2021-2026)

6.2 APAC Fluorinated Active Pharmaceutical Ingredients Sales by Degree of Fluorination (2021-2026)

6.3 APAC Fluorinated Active Pharmaceutical Ingredients Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Fluorinated Active Pharmaceutical Ingredients by Country

7.1.1 Europe Fluorinated Active Pharmaceutical Ingredients Sales by Country (2021-2026)

7.1.2 Europe Fluorinated Active Pharmaceutical Ingredients Revenue by Country (2021-2026)

7.2 Europe Fluorinated Active Pharmaceutical Ingredients Sales by Degree of Fluorination (2021-2026)

7.3 Europe Fluorinated Active Pharmaceutical Ingredients Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Fluorinated Active Pharmaceutical Ingredients by Country

8.1.1 Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales by Country (2021-2026)

8.1.2 Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Revenue by Country (2021-2026)

8.2 Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales by Degree of Fluorination (2021-2026)

8.3 Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Fluorinated Active Pharmaceutical Ingredients

10.3 Manufacturing Process Analysis of Fluorinated Active Pharmaceutical Ingredients

10.4 Industry Chain Structure of Fluorinated Active Pharmaceutical Ingredients

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Fluorinated Active Pharmaceutical Ingredients Distributors

11.3 Fluorinated Active Pharmaceutical Ingredients Customer

12 WORLD FORECAST REVIEW FOR FLUORINATED ACTIVE PHARMACEUTICAL INGREDIENTS BY GEOGRAPHIC REGION

12.1 Global Fluorinated Active Pharmaceutical Ingredients Market Size Forecast by Region

12.1.1 Global Fluorinated Active Pharmaceutical Ingredients Forecast by Region (2027-2032)

12.1.2 Global Fluorinated Active Pharmaceutical Ingredients Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Fluorinated Active Pharmaceutical Ingredients Forecast by Degree of Fluorination (2027-2032)

12.7 Global Fluorinated Active Pharmaceutical Ingredients Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Dr. Reddy's Laboratories Limited

13.1.1 Dr. Reddy's Laboratories Limited Company Information

13.1.2 Dr. Reddy's Laboratories Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.1.3 Dr. Reddy's Laboratories Limited Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Dr. Reddy's Laboratories Limited Main Business Overview

13.1.5 Dr. Reddy's Laboratories Limited Latest Developments

13.2 AGC Inc.

13.2.1 AGC Inc. Company Information

13.2.2 AGC Inc. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and

Specifications

13.2.3 AGC Inc. Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 AGC Inc. Main Business Overview

13.2.5 AGC Inc. Latest Developments

13.3 Navin Fluorine International Limited

13.3.1 Navin Fluorine International Limited Company Information

13.3.2 Navin Fluorine International Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.3.3 Navin Fluorine International Limited Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Navin Fluorine International Limited Main Business Overview

13.3.5 Navin Fluorine International Limited Latest Developments

13.4 Orion Corporation

13.4.1 Orion Corporation Company Information

13.4.2 Orion Corporation Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.4.3 Orion Corporation Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Orion Corporation Main Business Overview

13.4.5 Orion Corporation Latest Developments

13.5 Aurobindo Pharma Limited

13.5.1 Aurobindo Pharma Limited Company Information

13.5.2 Aurobindo Pharma Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.5.3 Aurobindo Pharma Limited Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Aurobindo Pharma Limited Main Business Overview

13.5.5 Aurobindo Pharma Limited Latest Developments

13.6 Laurus Labs Limited

13.6.1 Laurus Labs Limited Company Information

13.6.2 Laurus Labs Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.6.3 Laurus Labs Limited Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Laurus Labs Limited Main Business Overview

13.6.5 Laurus Labs Limited Latest Developments

13.7 Micro Labs Limited

13.7.1 Micro Labs Limited Company Information

13.7.2 Micro Labs Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.7.3 Micro Labs Limited Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Micro Labs Limited Main Business Overview

13.7.5 Micro Labs Limited Latest Developments

13.8 Mangalam Drugs and Organics Limited

13.8.1 Mangalam Drugs and Organics Limited Company Information

13.8.2 Mangalam Drugs and Organics Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.8.3 Mangalam Drugs and Organics Limited Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Mangalam Drugs and Organics Limited Main Business Overview

13.8.5 Mangalam Drugs and Organics Limited Latest Developments

13.9 Aurore Life Sciences Private Limited

13.9.1 Aurore Life Sciences Private Limited Company Information

13.9.2 Aurore Life Sciences Private Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.9.3 Aurore Life Sciences Private Limited Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Aurore Life Sciences Private Limited Main Business Overview

13.9.5 Aurore Life Sciences Private Limited Latest Developments

13.10 Styrax Pharma Private Limited

13.10.1 Styrax Pharma Private Limited Company Information

13.10.2 Styrax Pharma Private Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.10.3 Styrax Pharma Private Limited Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Styrax Pharma Private Limited Main Business Overview

13.10.5 Styrax Pharma Private Limited Latest Developments

13.11 BDR Pharmaceuticals International Pvt. Ltd.

13.11.1 BDR Pharmaceuticals International Pvt. Ltd. Company Information

13.11.2 BDR Pharmaceuticals International Pvt. Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.11.3 BDR Pharmaceuticals International Pvt. Ltd. Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 BDR Pharmaceuticals International Pvt. Ltd. Main Business Overview

13.11.5 BDR Pharmaceuticals International Pvt. Ltd. Latest Developments

13.12 Viva Biotech Holdings

- 13.12.1 Viva Biotech Holdings Company Information
- 13.12.2 Viva Biotech Holdings Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications
- 13.12.3 Viva Biotech Holdings Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.12.4 Viva Biotech Holdings Main Business Overview
- 13.12.5 Viva Biotech Holdings Latest Developments
- 13.13 Zhejiang Jiuzhou Pharmaceutical Co., Ltd.
- 13.13.1 Zhejiang Jiuzhou Pharmaceutical Co., Ltd. Company Information
- 13.13.2 Zhejiang Jiuzhou Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications
- 13.13.3 Zhejiang Jiuzhou Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.13.4 Zhejiang Jiuzhou Pharmaceutical Co., Ltd. Main Business Overview
- 13.13.5 Zhejiang Jiuzhou Pharmaceutical Co., Ltd. Latest Developments
- 13.14 Shanghai Desano Pharmaceutical Group Co., Ltd.
- 13.14.1 Shanghai Desano Pharmaceutical Group Co., Ltd. Company Information
- 13.14.2 Shanghai Desano Pharmaceutical Group Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications
- 13.14.3 Shanghai Desano Pharmaceutical Group Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.14.4 Shanghai Desano Pharmaceutical Group Co., Ltd. Main Business Overview
- 13.14.5 Shanghai Desano Pharmaceutical Group Co., Ltd. Latest Developments
- 13.15 Zhejiang Jingxin Pharmaceutical Co., Ltd.
- 13.15.1 Zhejiang Jingxin Pharmaceutical Co., Ltd. Company Information
- 13.15.2 Zhejiang Jingxin Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications
- 13.15.3 Zhejiang Jingxin Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.15.4 Zhejiang Jingxin Pharmaceutical Co., Ltd. Main Business Overview
- 13.15.5 Zhejiang Jingxin Pharmaceutical Co., Ltd. Latest Developments
- 13.16 Zhejiang East Asia Pharmaceutical Co., Ltd.
- 13.16.1 Zhejiang East Asia Pharmaceutical Co., Ltd. Company Information
- 13.16.2 Zhejiang East Asia Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications
- 13.16.3 Zhejiang East Asia Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.16.4 Zhejiang East Asia Pharmaceutical Co., Ltd. Main Business Overview
- 13.16.5 Zhejiang East Asia Pharmaceutical Co., Ltd. Latest Developments

13.17 Fluoropharm Co., Ltd.

13.17.1 Fluoropharm Co., Ltd. Company Information

13.17.2 Fluoropharm Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

13.17.3 Fluoropharm Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Fluoropharm Co., Ltd. Main Business Overview

13.17.5 Fluoropharm Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Fluorinated Active Pharmaceutical Ingredients Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Fluorinated Active Pharmaceutical Ingredients Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Monofluorinated APIs

Table 4. Major Players of Polyfluorinated APIs

Table 5. Global Fluorinated Active Pharmaceutical Ingredients Sales by Degree of Fluorination (2021-2026) & (Tons)

Table 6. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Degree of Fluorination (2021-2026)

Table 7. Global Fluorinated Active Pharmaceutical Ingredients Revenue by Degree of Fluorination (2021-2026) & (\$ million)

Table 8. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Degree of Fluorination (2021-2026)

Table 9. Global Fluorinated Active Pharmaceutical Ingredients Sale Price by Degree of Fluorination (2021-2026) & (US\$/kg)

Table 10. Major Players of Innovator and Patent-protected APIs

Table 11. Major Players of Off-patent and Generic APIs

Table 12. Global Fluorinated Active Pharmaceutical Ingredients Sales by Drug Market Status (2021-2026) & (Tons)

Table 13. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Drug Market Status (2021-2026)

Table 14. Global Fluorinated Active Pharmaceutical Ingredients Revenue by Drug Market Status (2021-2026) & (\$ million)

Table 15. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Drug Market Status (2021-2026)

Table 16. Global Fluorinated Active Pharmaceutical Ingredients Sale Price by Drug Market Status (2021-2026) & (US\$/kg)

Table 17. Major Players of High Potency APIs (OEL $\leq 10 \mu\text{g}/\text{m}^3$)

Table 18. Major Players of Conventional APIs (OEL $>10 \mu\text{g}/\text{m}^3$)

Table 19. Global Fluorinated Active Pharmaceutical Ingredients Sales by Potency Classification (2021-2026) & (Tons)

Table 20. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Potency Classification (2021-2026)

Table 21. Global Fluorinated Active Pharmaceutical Ingredients Revenue by Potency

Classification (2021-2026) & (\$ million)

Table 22. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Potency Classification (2021-2026)

Table 23. Global Fluorinated Active Pharmaceutical Ingredients Sale Price by Potency Classification (2021-2026) & (US\$/kg)

Table 24. Global Fluorinated Active Pharmaceutical Ingredients Sale by Application (2021-2026) & (Tons)

Table 25. Global Fluorinated Active Pharmaceutical Ingredients Sale Market Share by Application (2021-2026)

Table 26. Global Fluorinated Active Pharmaceutical Ingredients Revenue by Application (2021-2026) & (\$ million)

Table 27. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Application (2021-2026)

Table 28. Global Fluorinated Active Pharmaceutical Ingredients Sale Price by Application (2021-2026) & (US\$/kg)

Table 29. Global Fluorinated Active Pharmaceutical Ingredients Sales by Company (2021-2026) & (Tons)

Table 30. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Company (2021-2026)

Table 31. Global Fluorinated Active Pharmaceutical Ingredients Revenue by Company (2021-2026) & (\$ millions)

Table 32. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Company (2021-2026)

Table 33. Global Fluorinated Active Pharmaceutical Ingredients Sale Price by Company (2021-2026) & (US\$/kg)

Table 34. Key Manufacturers Fluorinated Active Pharmaceutical Ingredients Producing Area Distribution and Sales Area

Table 35. Players Fluorinated Active Pharmaceutical Ingredients Products Offered

Table 36. Fluorinated Active Pharmaceutical Ingredients Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 37. New Products and Potential Entrants

Table 38. Market M&A Activity & Strategy

Table 39. Global Fluorinated Active Pharmaceutical Ingredients Sales by Geographic Region (2021-2026) & (Tons)

Table 40. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share Geographic Region (2021-2026)

Table 41. Global Fluorinated Active Pharmaceutical Ingredients Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 42. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share

by Geographic Region (2021-2026)

Table 43. Global Fluorinated Active Pharmaceutical Ingredients Sales by Country/Region (2021-2026) & (Tons)

Table 44. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Country/Region (2021-2026)

Table 45. Global Fluorinated Active Pharmaceutical Ingredients Revenue by Country/Region (2021-2026) & (\$ millions)

Table 46. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Country/Region (2021-2026)

Table 47. Americas Fluorinated Active Pharmaceutical Ingredients Sales by Country (2021-2026) & (Tons)

Table 48. Americas Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Country (2021-2026)

Table 49. Americas Fluorinated Active Pharmaceutical Ingredients Revenue by Country (2021-2026) & (\$ millions)

Table 50. Americas Fluorinated Active Pharmaceutical Ingredients Sales by Degree of Fluorination (2021-2026) & (Tons)

Table 51. Americas Fluorinated Active Pharmaceutical Ingredients Sales by Application (2021-2026) & (Tons)

Table 52. APAC Fluorinated Active Pharmaceutical Ingredients Sales by Region (2021-2026) & (Tons)

Table 53. APAC Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Region (2021-2026)

Table 54. APAC Fluorinated Active Pharmaceutical Ingredients Revenue by Region (2021-2026) & (\$ millions)

Table 55. APAC Fluorinated Active Pharmaceutical Ingredients Sales by Degree of Fluorination (2021-2026) & (Tons)

Table 56. APAC Fluorinated Active Pharmaceutical Ingredients Sales by Application (2021-2026) & (Tons)

Table 57. Europe Fluorinated Active Pharmaceutical Ingredients Sales by Country (2021-2026) & (Tons)

Table 58. Europe Fluorinated Active Pharmaceutical Ingredients Revenue by Country (2021-2026) & (\$ millions)

Table 59. Europe Fluorinated Active Pharmaceutical Ingredients Sales by Degree of Fluorination (2021-2026) & (Tons)

Table 60. Europe Fluorinated Active Pharmaceutical Ingredients Sales by Application (2021-2026) & (Tons)

Table 61. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales by Country (2021-2026) & (Tons)

Table 62. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Country (2021-2026)

Table 63. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales by Degree of Fluorination (2021-2026) & (Tons)

Table 64. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales by Application (2021-2026) & (Tons)

Table 65. Key Market Drivers & Growth Opportunities of Fluorinated Active Pharmaceutical Ingredients

Table 66. Key Market Challenges & Risks of Fluorinated Active Pharmaceutical Ingredients

Table 67. Key Industry Trends of Fluorinated Active Pharmaceutical Ingredients

Table 68. Fluorinated Active Pharmaceutical Ingredients Raw Material

Table 69. Key Suppliers of Raw Materials

Table 70. Fluorinated Active Pharmaceutical Ingredients Distributors List

Table 71. Fluorinated Active Pharmaceutical Ingredients Customer List

Table 72. Global Fluorinated Active Pharmaceutical Ingredients Sales Forecast by Region (2027-2032) & (Tons)

Table 73. Global Fluorinated Active Pharmaceutical Ingredients Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 74. Americas Fluorinated Active Pharmaceutical Ingredients Sales Forecast by Country (2027-2032) & (Tons)

Table 75. Americas Fluorinated Active Pharmaceutical Ingredients Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 76. APAC Fluorinated Active Pharmaceutical Ingredients Sales Forecast by Region (2027-2032) & (Tons)

Table 77. APAC Fluorinated Active Pharmaceutical Ingredients Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 78. Europe Fluorinated Active Pharmaceutical Ingredients Sales Forecast by Country (2027-2032) & (Tons)

Table 79. Europe Fluorinated Active Pharmaceutical Ingredients Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 80. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales Forecast by Country (2027-2032) & (Tons)

Table 81. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. Global Fluorinated Active Pharmaceutical Ingredients Sales Forecast by Degree of Fluorination (2027-2032) & (Tons)

Table 83. Global Fluorinated Active Pharmaceutical Ingredients Revenue Forecast by Degree of Fluorination (2027-2032) & (\$ millions)

Table 84. Global Fluorinated Active Pharmaceutical Ingredients Sales Forecast by Application (2027-2032) & (Tons)

Table 85. Global Fluorinated Active Pharmaceutical Ingredients Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 86. Dr. Reddy's Laboratories Limited Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 87. Dr. Reddy's Laboratories Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 88. Dr. Reddy's Laboratories Limited Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 89. Dr. Reddy's Laboratories Limited Main Business

Table 90. Dr. Reddy's Laboratories Limited Latest Developments

Table 91. AGC Inc. Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 92. AGC Inc. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 93. AGC Inc. Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 94. AGC Inc. Main Business

Table 95. AGC Inc. Latest Developments

Table 96. Navin Fluorine International Limited Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 97. Navin Fluorine International Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 98. Navin Fluorine International Limited Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 99. Navin Fluorine International Limited Main Business

Table 100. Navin Fluorine International Limited Latest Developments

Table 101. Orion Corporation Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 102. Orion Corporation Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 103. Orion Corporation Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 104. Orion Corporation Main Business

Table 105. Orion Corporation Latest Developments

Table 106. Aurobindo Pharma Limited Basic Information, Fluorinated Active

Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 107. Aurobindo Pharma Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 108. Aurobindo Pharma Limited Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 109. Aurobindo Pharma Limited Main Business

Table 110. Aurobindo Pharma Limited Latest Developments

Table 111. Laurus Labs Limited Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 112. Laurus Labs Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 113. Laurus Labs Limited Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 114. Laurus Labs Limited Main Business

Table 115. Laurus Labs Limited Latest Developments

Table 116. Micro Labs Limited Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 117. Micro Labs Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 118. Micro Labs Limited Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 119. Micro Labs Limited Main Business

Table 120. Micro Labs Limited Latest Developments

Table 121. Mangalam Drugs and Organics Limited Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 122. Mangalam Drugs and Organics Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 123. Mangalam Drugs and Organics Limited Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 124. Mangalam Drugs and Organics Limited Main Business

Table 125. Mangalam Drugs and Organics Limited Latest Developments

Table 126. Aurore Life Sciences Private Limited Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 127. Aurore Life Sciences Private Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 128. Aurore Life Sciences Private Limited Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 129. Aurore Life Sciences Private Limited Main Business

Table 130. Aurore Life Sciences Private Limited Latest Developments

Table 131. Styrax Pharma Private Limited Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 132. Styrax Pharma Private Limited Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 133. Styrax Pharma Private Limited Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 134. Styrax Pharma Private Limited Main Business

Table 135. Styrax Pharma Private Limited Latest Developments

Table 136. BDR Pharmaceuticals International Pvt. Ltd. Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 137. BDR Pharmaceuticals International Pvt. Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 138. BDR Pharmaceuticals International Pvt. Ltd. Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 139. BDR Pharmaceuticals International Pvt. Ltd. Main Business

Table 140. BDR Pharmaceuticals International Pvt. Ltd. Latest Developments

Table 141. Viva Biotech Holdings Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 142. Viva Biotech Holdings Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 143. Viva Biotech Holdings Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 144. Viva Biotech Holdings Main Business

Table 145. Viva Biotech Holdings Latest Developments

Table 146. Zhejiang Jiuzhou Pharmaceutical Co., Ltd. Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 147. Zhejiang Jiuzhou Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 148. Zhejiang Jiuzhou Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 149. Zhejiang Jiuzhou Pharmaceutical Co., Ltd. Main Business

Table 150. Zhejiang Jiuzhou Pharmaceutical Co., Ltd. Latest Developments

Table 151. Shanghai Desano Pharmaceutical Group Co., Ltd. Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its

Competitors

Table 152. Shanghai Desano Pharmaceutical Group Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 153. Shanghai Desano Pharmaceutical Group Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 154. Shanghai Desano Pharmaceutical Group Co., Ltd. Main Business

Table 155. Shanghai Desano Pharmaceutical Group Co., Ltd. Latest Developments

Table 156. Zhejiang Jingxin Pharmaceutical Co., Ltd. Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 157. Zhejiang Jingxin Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 158. Zhejiang Jingxin Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 159. Zhejiang Jingxin Pharmaceutical Co., Ltd. Main Business

Table 160. Zhejiang Jingxin Pharmaceutical Co., Ltd. Latest Developments

Table 161. Zhejiang East Asia Pharmaceutical Co., Ltd. Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 162. Zhejiang East Asia Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 163. Zhejiang East Asia Pharmaceutical Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 164. Zhejiang East Asia Pharmaceutical Co., Ltd. Main Business

Table 165. Zhejiang East Asia Pharmaceutical Co., Ltd. Latest Developments

Table 166. Fluoropharm Co., Ltd. Basic Information, Fluorinated Active Pharmaceutical Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 167. Fluoropharm Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Product Portfolios and Specifications

Table 168. Fluoropharm Co., Ltd. Fluorinated Active Pharmaceutical Ingredients Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 169. Fluoropharm Co., Ltd. Main Business

Table 170. Fluoropharm Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Fluorinated Active Pharmaceutical Ingredients
- Figure 2. Fluorinated Active Pharmaceutical Ingredients Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Fluorinated Active Pharmaceutical Ingredients Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global Fluorinated Active Pharmaceutical Ingredients Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Fluorinated Active Pharmaceutical Ingredients Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Country/Region (2025)
- Figure 10. Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Monofluorinated APIs
- Figure 12. Product Picture of Polyfluorinated APIs
- Figure 13. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Degree of Fluorination in 2026
- Figure 14. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Degree of Fluorination (2021-2026)
- Figure 15. Product Picture of Innovator and Patent-protected APIs
- Figure 16. Product Picture of Off-patent and Generic APIs
- Figure 17. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Drug Market Status in 2026
- Figure 18. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Drug Market Status (2021-2026)
- Figure 19. Product Picture of High Potency APIs (OEL $\leq 10 \mu\text{g/m}^3$)
- Figure 20. Product Picture of Conventional APIs (OEL $>10 \mu\text{g/m}^3$)
- Figure 21. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Potency Classification in 2026
- Figure 22. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Potency Classification (2021-2026)
- Figure 23. Fluorinated Active Pharmaceutical Ingredients Consumed in Oncology
- Figure 24. Global Fluorinated Active Pharmaceutical Ingredients Market: Oncology

(2021-2026) & (Tons)

Figure 25. Fluorinated Active Pharmaceutical Ingredients Consumed in Anti-infectives

Figure 26. Global Fluorinated Active Pharmaceutical Ingredients Market: Anti-infectives (2021-2026) & (Tons)

Figure 27. Fluorinated Active Pharmaceutical Ingredients Consumed in Central Nervous System

Figure 28. Global Fluorinated Active Pharmaceutical Ingredients Market: Central Nervous System (2021-2026) & (Tons)

Figure 29. Fluorinated Active Pharmaceutical Ingredients Consumed in Metabolic and Endocrine Diseases

Figure 30. Global Fluorinated Active Pharmaceutical Ingredients Market: Metabolic and Endocrine Diseases (2021-2026) & (Tons)

Figure 31. Fluorinated Active Pharmaceutical Ingredients Consumed in Cardiovascular Diseases

Figure 32. Global Fluorinated Active Pharmaceutical Ingredients Market: Cardiovascular Diseases (2021-2026) & (Tons)

Figure 33. Fluorinated Active Pharmaceutical Ingredients Consumed in Respiratory Diseases

Figure 34. Global Fluorinated Active Pharmaceutical Ingredients Market: Respiratory Diseases (2021-2026) & (Tons)

Figure 35. Fluorinated Active Pharmaceutical Ingredients Consumed in Others

Figure 36. Global Fluorinated Active Pharmaceutical Ingredients Market: Others (2021-2026) & (Tons)

Figure 37. Global Fluorinated Active Pharmaceutical Ingredients Sale Market Share by Application (2025)

Figure 38. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Application in 2025

Figure 39. Fluorinated Active Pharmaceutical Ingredients Sales by Company in 2025 (Tons)

Figure 40. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Company in 2025

Figure 41. Fluorinated Active Pharmaceutical Ingredients Revenue by Company in 2025 (\$ millions)

Figure 42. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Company in 2025

Figure 43. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Geographic Region (2021-2026)

Figure 44. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Geographic Region in 2025

Figure 45. Americas Fluorinated Active Pharmaceutical Ingredients Sales 2021-2026 (Tons)

Figure 46. Americas Fluorinated Active Pharmaceutical Ingredients Revenue 2021-2026 (\$ millions)

Figure 47. APAC Fluorinated Active Pharmaceutical Ingredients Sales 2021-2026 (Tons)

Figure 48. APAC Fluorinated Active Pharmaceutical Ingredients Revenue 2021-2026 (\$ millions)

Figure 49. Europe Fluorinated Active Pharmaceutical Ingredients Sales 2021-2026 (Tons)

Figure 50. Europe Fluorinated Active Pharmaceutical Ingredients Revenue 2021-2026 (\$ millions)

Figure 51. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales 2021-2026 (Tons)

Figure 52. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Revenue 2021-2026 (\$ millions)

Figure 53. Americas Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Country in 2025

Figure 54. Americas Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Country (2021-2026)

Figure 55. Americas Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Degree of Fluorination (2021-2026)

Figure 56. Americas Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Application (2021-2026)

Figure 57. United States Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 58. Canada Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 59. Mexico Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 60. Brazil Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 61. APAC Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Region in 2025

Figure 62. APAC Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Region (2021-2026)

Figure 63. APAC Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Degree of Fluorination (2021-2026)

Figure 64. APAC Fluorinated Active Pharmaceutical Ingredients Sales Market Share by

Application (2021-2026)

Figure 65. China Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 66. Japan Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 67. South Korea Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 68. Southeast Asia Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 69. India Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 70. Australia Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 71. China Taiwan Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 72. Europe Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Country in 2025

Figure 73. Europe Fluorinated Active Pharmaceutical Ingredients Revenue Market Share by Country (2021-2026)

Figure 74. Europe Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Degree of Fluorination (2021-2026)

Figure 75. Europe Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Application (2021-2026)

Figure 76. Germany Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 77. France Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 78. UK Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 79. Italy Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 80. Russia Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 81. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Country (2021-2026)

Figure 82. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Degree of Fluorination (2021-2026)

Figure 83. Middle East & Africa Fluorinated Active Pharmaceutical Ingredients Sales Market Share by Application (2021-2026)

Figure 84. Egypt Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 85. South Africa Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 86. Israel Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 87. Turkey Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 88. GCC Countries Fluorinated Active Pharmaceutical Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 89. Manufacturing Cost Structure Analysis of Fluorinated Active Pharmaceutical Ingredients in 2026

Figure 90. Manufacturing Process Analysis of Fluorinated Active Pharmaceutical Ingredients

Figure 91. Industry Chain Structure of Fluorinated Active Pharmaceutical Ingredients

Figure 92. Channels of Distribution

Figure 93. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Forecast by Region (2027-2032)

Figure 94. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share Forecast by Region (2027-2032)

Figure 95. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share Forecast by Degree of Fluorination (2027-2032)

Figure 96. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share Forecast by Degree of Fluorination (2027-2032)

Figure 97. Global Fluorinated Active Pharmaceutical Ingredients Sales Market Share Forecast by Application (2027-2032)

Figure 98. Global Fluorinated Active Pharmaceutical Ingredients Revenue Market Share Forecast by Application (2027-2032)

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