

1,1,1,3,3-Pentafluoropropane Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

1,1,1,3,3-Pentafluoropropane Market Summary

Introduction

1,1,1,3,3-Pentafluoropropane, commonly known as HFC-245fa, is a hydrofluorocarbon (HFC) used primarily as a polyurethane (PU) foam blowing agent and refrigerant, valued for its low global warming potential (GWP) relative to older alternatives and its non-ozone-depleting properties. The market emphasizes environmental compliance, thermal insulation performance, and energy efficiency, driven by demand for sustainable construction materials and refrigeration solutions. It caters to industries seeking eco-friendly alternatives, reflecting a sector shaped by regulatory pressures and green building trends. Key drivers include the shift away from high-GWP substances, increasing construction activities, and advancements in fluorochemical production.

Market Size and Growth Forecast

The global 1,1,1,3,3-Pentafluoropropane market is estimated to reach USD 200 to 300 million in 2025, with a projected compound annual growth rate (CAGR) of 5.0% to 6.0% from 2025 to 2030. This growth is propelled by expanding applications in insulation and refrigeration sectors.

Regional Analysis

North America: Holds 25-30% market share, with a growth rate of 4-5%. Growth is driven by refrigerant use, with the United States leading in HVAC adoption and Canada focusing on insulation for energy-efficient buildings.

Europe: Accounts for 20-25% market share, with a growth rate of 4-5%. Demand from Germany and France supports stability, driven by stringent environmental regulations.

Asia Pacific: Represents 35-40% market share, with a growth rate of 6-7%. China and

Japan drive growth with construction and refrigeration production.
Rest of the World: Holds 10-15% market share, growing at 5-6%, with Brazil leading due to infrastructure development.
Trends in Europe focus on sustainability, while Asia Pacific emphasizes cost-effective scale.

Application Analysis

PU foam blowing grows at 5-6%, driven by demand for insulation in construction, with trends toward 1,1,1,3,3-Pentafluoropropane in rigid foam for energy-efficient buildings. Refrigerant applications grow at 4-5%, fueled by HVAC needs, with trends toward use in low-GWP systems replacing older refrigerants.

Key Market Players

Honeywell: A global leader in fluorochemicals, Honeywell offers 1,1,1,3,3-Pentafluoropropane for refrigerants and foam blowing. Known for its innovative, sustainable solutions, it serves diverse industries.
Central Glass: Central Glass provides 1,1,1,3,3-Pentafluoropropane for regional markets. It focuses on reliable, high-quality products for Japan's construction sector.
Juhua: Juhua supplies 1,1,1,3,3-Pentafluoropropane for insulation uses. It excels in scalable, cost-effective solutions for China.
Shandong Hua'an: Shandong Hua'an offers 1,1,1,3,3-Pentafluoropropane for regional needs. Known for its practical products, it supports Asia's markets.
Artsen Chemical: Artsen Chemical provides 1,1,1,3,3-Pentafluoropropane for niche applications. It focuses on quality solutions for specialized industries.
These companies compete on compliance, performance, and cost, driving the market through innovation.

Porter's Five Forces Analysis

The threat of new entrants is moderate due to regulatory and technical barriers in HFC production. Substitutes are medium, with newer HFOs emerging as alternatives. Buyer power is medium, with construction and HVAC firms negotiating terms. Supplier power is moderate due to reliance on fluorochemical raw materials. Rivalry is high, pushing advancements in cost efficiency and environmental performance.

Market Opportunities and Challenges

Opportunities

Rising demand for green building materials boosting PU foam use.
Advancements in low-GWP refrigerant technology.
Expansion into emerging construction markets.

Challenges

High production costs limiting adoption in price-sensitive regions.

Regulatory shifts toward even lower-GWP alternatives.

Market saturation in developed regions requiring differentiation.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method

CHAPTER 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 1,1,1,3,3-Pentafluoropropane Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 TRADING ANALYSIS

- 8.1 Export of 1,1,1,3,3-Pentafluoropropane by Region
- 8.2 Import of 1,1,1,3,3-Pentafluoropropane by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST 1,1,1,3,3-PENTAFLUOROPROPANE MARKET IN NORTH AMERICA (2020-2030)

- 9.1 1,1,1,3,3-Pentafluoropropane Market Size
- 9.2 1,1,1,3,3-Pentafluoropropane Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
 - 9.5.1 United States
 - 9.5.2 Canada
 - 9.5.3 Mexico

CHAPTER 10 HISTORICAL AND FORECAST 1,1,1,3,3-PENTAFLUOROPROPANE MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 1,1,1,3,3-Pentafluoropropane Market Size
- 10.2 1,1,1,3,3-Pentafluoropropane Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
 - 10.5.1 Brazil
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

CHAPTER 11 HISTORICAL AND FORECAST 1,1,1,3,3-PENTAFLUOROPROPANE MARKET IN ASIA & PACIFIC (2020-2030)

- 11.1 1,1,1,3,3-Pentafluoropropane Market Size
- 11.2 1,1,1,3,3-Pentafluoropropane Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
 - 11.5.1 China
 - 11.5.2 India
 - 11.5.3 Japan
 - 11.5.4 South Korea
 - 11.5.5 Southeast Asia
 - 11.5.6 Australia

CHAPTER 12 HISTORICAL AND FORECAST 1,1,1,3,3-PENTAFLUOROPROPANE MARKET IN EUROPE (2020-2030)

- 12.1 1,1,1,3,3-Pentafluoropropane Market Size
- 12.2 1,1,1,3,3-Pentafluoropropane Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
 - 12.5.1 Germany
 - 12.5.2 France
 - 12.5.3 United Kingdom
 - 12.5.4 Italy
 - 12.5.5 Spain
 - 12.5.6 Belgium
 - 12.5.7 Netherlands
 - 12.5.8 Austria
 - 12.5.9 Poland
 - 12.5.10 Russia

CHAPTER 13 HISTORICAL AND FORECAST 1,1,1,3,3-PENTAFLUOROPROPANE MARKET IN MEA (2020-2030)

- 13.1 1,1,1,3,3-Pentafluoropropane Market Size
- 13.2 1,1,1,3,3-Pentafluoropropane Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL 1,1,1,3,3-PENTAFLUOROPROPANE MARKET (2020-2025)

- 14.1 1,1,1,3,3-Pentafluoropropane Market Size
- 14.2 1,1,1,3,3-Pentafluoropropane Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

CHAPTER 15 GLOBAL 1,1,1,3,3-PENTAFLUOROPROPANE MARKET FORECAST (2025-2030)

- 15.1 1,1,1,3,3-Pentafluoropropane Market Size Forecast
- 15.2 1,1,1,3,3-Pentafluoropropane Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 Honeywell
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and 1,1,1,3,3-Pentafluoropropane Information
 - 16.1.3 SWOT Analysis of Honeywell
 - 16.1.4 Honeywell 1,1,1,3,3-Pentafluoropropane Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 Central Glass
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and 1,1,1,3,3-Pentafluoropropane Information
 - 16.2.3 SWOT Analysis of Central Glass
 - 16.2.4 Central Glass 1,1,1,3,3-Pentafluoropropane Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 Juhua
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and 1,1,1,3,3-Pentafluoropropane Information

16.3.3 SWOT Analysis of Juhua	
16.3.4 Juhua 1,1,1,3,3-Pentafluoropropane Sales, Revenue, Price and Gross Margin (2020-2025)	
16.4 Shandong Hua'an	
16.4.1 Company Profile	
16.4.2 Main Business and 1,1,1,3,3-Pentafluoropropane Information	
16.4.3 SWOT Analysis of Shandong Hua'an	
16.4.4 Shandong Hua'an 1,1,1,3,3-Pentafluoropropane Sales, Revenue, Price and Gross Margin (2020-2025)	
16.5 Artsen Chemical	
16.5.1 Company Profile	
16.5.2 Main Business and 1,1,1,3,3-Pentafluoropropane Information	
16.5.3 SWOT Analysis of Artsen Chemical	
16.5.4 Artsen Chemical 1,1,1,3,3-Pentafluoropropane Sales, Revenue, Price and Gross Margin (2020-2025)	
Please ask for sample pages for full companies list	
Tables and Figures	
Table Abbreviation and Acronyms List	
Table Research Scope of 1,1,1,3,3-Pentafluoropropane Report	
Table Data Sources of 1,1,1,3,3-Pentafluoropropane Report	
Table Major Assumptions of 1,1,1,3,3-Pentafluoropropane Report	
Figure Market Size Estimated Method	
Figure Major Forecasting Factors	
Figure 1,1,1,3,3-Pentafluoropropane Picture	
Table 1,1,1,3,3-Pentafluoropropane Classification	
Table 1,1,1,3,3-Pentafluoropropane Applications List	
Table Drivers of 1,1,1,3,3-Pentafluoropropane Market	
Table Restraints of 1,1,1,3,3-Pentafluoropropane Market	
Table Opportunities of 1,1,1,3,3-Pentafluoropropane Market	
Table Threats of 1,1,1,3,3-Pentafluoropropane Market	
Table Raw Materials Suppliers List	
Table Different Production Methods of 1,1,1,3,3-Pentafluoropropane	
Table Cost Structure Analysis of 1,1,1,3,3-Pentafluoropropane	
Table Key End Users List	
Table Latest News of 1,1,1,3,3-Pentafluoropropane Market	
Table Merger and Acquisition List	
Table Planned/Future Project of 1,1,1,3,3-Pentafluoropropane Market	
Table Policy of 1,1,1,3,3-Pentafluoropropane Market	
Table 2020-2030 Regional Export of 1,1,1,3,3-Pentafluoropropane	

Table 2020-2030 Regional Import of 1,1,1,3,3-Pentafluoropropane

Table 2020-2030 Regional Trade Balance

Figure 2020-2030 Regional Trade Balance

Table 2020-2030 North America 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Figure 2020-2030 North America 1,1,1,3,3-Pentafluoropropane Market Size and CAGR

Figure 2020-2030 North America 1,1,1,3,3-Pentafluoropropane Market Volume and CAGR

Table 2020-2030 North America 1,1,1,3,3-Pentafluoropropane Demand List by Application

Table 2020-2025 North America 1,1,1,3,3-Pentafluoropropane Key Players Sales List

Table 2020-2025 North America 1,1,1,3,3-Pentafluoropropane Key Players Market Share List

Table 2020-2030 North America 1,1,1,3,3-Pentafluoropropane Demand List by Type

Table 2020-2025 North America 1,1,1,3,3-Pentafluoropropane Price List by Type

Table 2020-2030 United States 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 United States 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Canada 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Canada 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Mexico 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Mexico 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 South America 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Figure 2020-2030 South America 1,1,1,3,3-Pentafluoropropane Market Size and CAGR

Figure 2020-2030 South America 1,1,1,3,3-Pentafluoropropane Market Volume and CAGR

Table 2020-2030 South America 1,1,1,3,3-Pentafluoropropane Demand List by Application

Table 2020-2025 South America 1,1,1,3,3-Pentafluoropropane Key Players Sales List

Table 2020-2025 South America 1,1,1,3,3-Pentafluoropropane Key Players Market Share List

Table 2020-2030 South America 1,1,1,3,3-Pentafluoropropane Demand List by Type

Table 2020-2025 South America 1,1,1,3,3-Pentafluoropropane Price List by Type

Table 2020-2030 Brazil 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Brazil 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Argentina 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Argentina 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Chile 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Chile 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Peru 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Peru 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Asia & Pacific 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Figure 2020-2030 Asia & Pacific 1,1,1,3,3-Pentafluoropropane Market Size and CAGR

Figure 2020-2030 Asia & Pacific 1,1,1,3,3-Pentafluoropropane Market Volume and CAGR

Table 2020-2030 Asia & Pacific 1,1,1,3,3-Pentafluoropropane Demand List by Application

Table 2020-2025 Asia & Pacific 1,1,1,3,3-Pentafluoropropane Key Players Sales List

Table 2020-2025 Asia & Pacific 1,1,1,3,3-Pentafluoropropane Key Players Market Share List

Table 2020-2030 Asia & Pacific 1,1,1,3,3-Pentafluoropropane Demand List by Type

Table 2020-2025 Asia & Pacific 1,1,1,3,3-Pentafluoropropane Price List by Type

Table 2020-2030 China 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 China 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 India 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 India 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Japan 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Japan 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 South Korea 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 South Korea 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Southeast Asia 1,1,1,3,3-Pentafluoropropane Market Size List

Table 2020-2030 Southeast Asia 1,1,1,3,3-Pentafluoropropane Market Volume List

Table 2020-2030 Southeast Asia 1,1,1,3,3-Pentafluoropropane Import List

Table 2020-2030 Southeast Asia 1,1,1,3,3-Pentafluoropropane Export List

Table 2020-2030 Australia 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Australia 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Europe 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Figure 2020-2030 Europe 1,1,1,3,3-Pentafluoropropane Market Size and CAGR

Figure 2020-2030 Europe 1,1,1,3,3-Pentafluoropropane Market Volume and CAGR

Table 2020-2030 Europe 1,1,1,3,3-Pentafluoropropane Demand List by Application

Table 2020-2025 Europe 1,1,1,3,3-Pentafluoropropane Key Players Sales List

Table 2020-2025 Europe 1,1,1,3,3-Pentafluoropropane Key Players Market Share List

Table 2020-2030 Europe 1,1,1,3,3-Pentafluoropropane Demand List by Type

Table 2020-2025 Europe 1,1,1,3,3-Pentafluoropropane Price List by Type

Table 2020-2030 Germany 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Germany 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 France 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 France 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 United Kingdom 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 United Kingdom 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Italy 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Italy 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Spain 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Spain 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Belgium 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Belgium 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Netherlands 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Netherlands 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Austria 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Austria 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Poland 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Poland 1,1,1,3,3-Pentafluoropropane Import & Export List

Table 2020-2030 Russia 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List

Table 2020-2030 Russia 1,1,1,3,3-Pentafluoropropane Import & Export List	
Table 2020-2030 MEA 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List	
Figure 2020-2030 MEA 1,1,1,3,3-Pentafluoropropane Market Size and CAGR	
Figure 2020-2030 MEA 1,1,1,3,3-Pentafluoropropane Market Volume and CAGR	
Table 2020-2030 MEA 1,1,1,3,3-Pentafluoropropane Demand List by Application	
Table 2020-2025 MEA 1,1,1,3,3-Pentafluoropropane Key Players Sales List	
Table 2020-2025 MEA 1,1,1,3,3-Pentafluoropropane Key Players Market Share List	
Table 2020-2030 MEA 1,1,1,3,3-Pentafluoropropane Demand List by Type	
Table 2020-2025 MEA 1,1,1,3,3-Pentafluoropropane Price List by Type	
Table 2020-2030 Egypt 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List	
Table 2020-2030 Egypt 1,1,1,3,3-Pentafluoropropane Import & Export List	
Table 2020-2030 Israel 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List	
Table 2020-2030 Israel 1,1,1,3,3-Pentafluoropropane Import & Export List	
Table 2020-2030 South Africa 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List	
Table 2020-2030 South Africa 1,1,1,3,3-Pentafluoropropane Import & Export List	
Table 2020-2030 Gulf Cooperation Council Countries 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List	
Table 2020-2030 Gulf Cooperation Council Countries 1,1,1,3,3-Pentafluoropropane Import & Export List	
Table 2020-2030 Turkey 1,1,1,3,3-Pentafluoropropane Market Size and Market Volume List	
Table 2020-2030 Turkey 1,1,1,3,3-Pentafluoropropane Import & Export List	
Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Market Size List by Region	
Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Market Size Share List by Region	
Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Market Volume List by Region	
Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Market Volume Share List by Region	
Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Demand List by Application	
Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Demand Market Share List by Application	
Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Capacity List	
Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Key Vendors Capacity Share List	
Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Key Vendors Production List	
Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Key Vendors Production Share	

List

Figure 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Capacity Production and Growth Rate

Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Key Vendors Production Value List

Figure 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Production Value and Growth Rate

Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Key Vendors Production Value Share List

Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Demand List by Type

Table 2020-2025 Global 1,1,1,3,3-Pentafluoropropane Demand Market Share List by Type

Table 2020-2025 Regional 1,1,1,3,3-Pentafluoropropane Price List

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Market Size List by Region

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Market Size Share List by Region

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Market Volume List by Region

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Market Volume Share List by Region

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Demand List by Application

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Demand Market Share List by Application

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Capacity List

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Key Vendors Capacity Share List

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Key Vendors Production List

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Key Vendors Production Share List

Figure 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Capacity Production and Growth Rate

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Key Vendors Production Value List

Figure 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Production Value and Growth Rate

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Key Vendors Production Value Share List

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Demand List by Type

Table 2025-2030 Global 1,1,1,3,3-Pentafluoropropane Demand Market Share List by Type

Table 2025-2030 1,1,1,3,3-Pentafluoropropane Regional Price List

Table Honeywell Information

Table SWOT Analysis of Honeywell

Table 2020-2025 Honeywell 1,1,1,3,3-Pentafluoropropane Product Capacity Production Price Cost Production Value

Figure 2020-2025 Honeywell 1,1,1,3,3-Pentafluoropropane Capacity Production and Growth Rate

Figure 2020-2025 Honeywell 1,1,1,3,3-Pentafluoropropane Market Share

Table Central Glass Information

Table SWOT Analysis of Central Glass

Table 2020-2025 Central Glass 1,1,1,3,3-Pentafluoropropane Product Capacity Production Price Cost Production Value

Figure 2020-2025 Central Glass 1,1,1,3,3-Pentafluoropropane Capacity Production and Growth Rate

Figure 2020-2025 Central Glass 1,1,1,3,3-Pentafluoropropane Market Share

Table Juhua Information

Table SWOT Analysis of Juhua

Table 2020-2025 Juhua 1,1,1,3,3-Pentafluoropropane Product Capacity Production Price Cost Production Value

Figure 2020-2025 Juhua 1,1,1,3,3-Pentafluoropropane Capacity Production and Growth Rate

Figure 2020-2025 Juhua 1,1,1,3,3-Pentafluoropropane Market Share

Table Shandong Hua'an Information

Table SWOT Analysis of Shandong Hua'an

Table 2020-2025 Shandong Hua'an 1,1,1,3,3-Pentafluoropropane Product Capacity Production Price Cost Production Value

Figure 2020-2025 Shandong Hua'an 1,1,1,3,3-Pentafluoropropane Capacity Production and Growth Rate

Figure 2020-2025 Shandong Hua'an 1,1,1,3,3-Pentafluoropropane Market Share

Table Artsen Chemical Information

Table SWOT Analysis of Artsen Chemical

Table 2020-2025 Artsen Chemical 1,1,1,3,3-Pentafluoropropane Product Capacity Production Price Cost Production Value

Figure 2020-2025 Artsen Chemical 1,1,1,3,3-Pentafluoropropane Capacity Production and Growth Rate

Figure 2020-2025 Artsen Chemical 1,1,1,3,3-Pentafluoropropane Market Share

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