

Phenolic Resins Market - Global Industry Size, Share, Trends, Opportunity, & Forecast Segmented By Product (Novolac, Resol, Others), By Application (Wood Adhesives, Molding, insulations, Laminates, Coatings, Paper Impregnation, Others), By Region & Competition, 2020-2030F

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Report description:

Global Phenolic Resins Market was valued at USD 14.45 Billion in 2024 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.30% through 2030. Phenolic resins, derived from the condensation of phenol and formaldehyde, exhibit exceptional heat resistance, mechanical strength, and flame-retardant properties. These resins find extensive use across industries such as automotive, construction, electronics, and aerospace due to their adhesive, coating, and composite applications.

The phenolic resins market is navigating a dynamic landscape characterized by evolving industry trends, regulatory challenges, and promising opportunities. As the demand for high-performance materials continues to rise, the strategic positioning of companies, coupled with a commitment to sustainability and innovation, will be key determinants of success in this vibrant market.

Key Market Drivers

Diverse Industrial Applications

Phenolic resins owe their popularity to their adaptability across a wide range of industries. In 2022, total sales of new, light-duty vehicles in the U.S. amounted to approximately 13.6 million units, while used vehicle sales reached just under 39 million units. In total, about 52.2 million vehicles were sold that year. Over the past few years, used vehicle prices have seen a decline. In the automotive sector, these resins play a pivotal role in the production of lightweight composites, aligning with the industry's pursuit of fuel efficiency without compromising on structural integrity. The construction industry, a significant consumer of phenolic resins, utilizes them in laminates, adhesives, and coatings, contributing to the durability and fire resistance of various structures. Electronics and electrical applications benefit from the insulating properties of phenolic resins, particularly in the manufacturing of

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circuit boards. This not only enhances the performance of electronic devices but also ensures the safety and reliability of electrical systems. In the aerospace industry, where lightweight and durable materials are paramount, phenolic resins find applications in components that require both strength and fire resistance.

The inherent fire-resistant characteristics of phenolic resins make them indispensable in industries where safety is of utmost concern. Their ability to withstand high temperatures without compromising structural integrity positions them as a preferred choice in applications where fire safety standards are stringent. As industries worldwide are embracing sustainability, the phenolic resins market is witnessing a shift towards eco-friendly solutions. The development of bio-based and environmentally friendly phenolic resins caters to the growing demand for sustainable materials, ensuring that these polymers remain relevant in an environmentally conscious business landscape.

Strong Demand in Construction Sector

The phenolic resins market is experiencing a significant boost, and a key driver behind this surge is the robust demand emanating from the construction sector. As construction activities globally witness an upswing, the versatile applications of phenolic resins in this industry have become increasingly indispensable. Despite the efforts of individual companies, overall construction productivity improved by just 10% (0.4% annually) from 2000 to 2022. In comparison, the broader economy saw a 50% improvement (2% annually), while the manufacturing sector experienced a 90% increase (3% annually) during the same period. Moreover, between 2020 and 2022, productivity in the global construction industry actually declined by 8%.

Phenolic resins are employed across various facets of the construction sector, contributing to the strength, durability, and fire resistance of a myriad of structures. The construction sector is facing a persistent talent shortage. From August 2023 to July 2024, the industry averaged 382,000 job openings per month, marking the third consecutive year of a growing trend, with the average nearing 400,000. This rise in job openings is likely associated with increased investment in sectors such as manufacturing and nonresidential construction. These resins find extensive use in laminates, adhesives, coatings, and other construction materials, offering solutions that enhance the overall performance and longevity of buildings. One of the primary reasons for the strong demand for phenolic resins in the construction sector is their ability to enhance the structural integrity of materials. Phenolic resin-based laminates, for instance, are widely utilized for their high tensile strength and resistance to impact, making them ideal for applications where durability is paramount.

In construction, especially in the design and construction of commercial and public buildings, adherence to stringent fire safety standards is crucial. Phenolic resins, renowned for their excellent fire-resistant properties, are favoured materials for manufacturing fire-retardant coatings and structural elements, contributing significantly to the overall safety of constructed spaces.

With a growing emphasis on sustainable construction practices, phenolic resins have garnered attention for their potential to contribute to environmentally friendly building solutions. Some formulations of phenolic resins are derived from renewable resources, aligning with the industry's commitment to sustainable and eco-friendly materials. As countries worldwide embark on ambitious infrastructure projects and urban development initiatives, the demand for construction materials, including those incorporating phenolic resins, is experiencing a notable surge. The construction boom in emerging economies, in particular, presents lucrative opportunities for phenolic resin manufacturers.

Fire Resistant Properties

Phenolic resins, synthesized from the condensation of phenol and formaldehyde, inherently possess exceptional fire-resistant characteristics. This inherent property makes them a sought-after material in various industries where safety is paramount. The ability of phenolic resins to resist combustion and prevent the spread of flames positions them as a reliable choice in applications where fire safety is a non-negotiable requirement.

The construction sector, in particular, has emerged as a significant consumer of phenolic resins owing to their unparalleled fire-resistant properties. These resins are extensively used in the formulation of fire-retardant coatings, laminates, and structural elements. In the design and construction of commercial buildings, public spaces, and transportation infrastructure, adherence to stringent fire safety standards is imperative. Phenolic resins, with their ability to withstand high temperatures and prevent the propagation of fire, play a crucial role in ensuring the safety and integrity of constructed spaces.

Beyond construction, the automotive and aerospace industries also leverage the fire-resistant properties of phenolic resins. In these sectors, materials that can withstand extreme temperatures are essential for ensuring the safety of vehicles and aircraft

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components. Phenolic resins contribute to the development of lightweight and fire-resistant composites, aligning with the industry's focus on enhancing safety without compromising efficiency.

Key Market Challenges

Environmental Regulations

The phenolic resins market, while flourishing due to its versatile applications, faces a formidable challenge in the form of stringent environmental regulations. As global awareness of environmental sustainability intensifies, the production processes and raw materials involved in phenolic resins have come under scrutiny, presenting significant hurdles for industry players.

One of the primary challenges stems from the chemical nature of phenolic resins' production, involving the condensation of phenol and formaldehyde. The synthesis process often employs chemicals that raise environmental concerns, leading to increased scrutiny and the need for adherence to strict regulatory standards.

Environmental regulations, designed to mitigate the environmental impact of industrial processes, often impose stringent emission standards on companies involved in the production of phenolic resins. This requires manufacturers to invest in advanced emission control technologies and processes, leading to increased operational costs.

The push towards sustainability and green practices has intensified the search for bio-based and environmentally friendly alternatives to traditional phenolic resins. While some strides have been made in developing eco-friendly formulations, achieving a balance between performance, cost, and sustainability remains a significant challenge.

Substitution by Alternative Materials

The phenolic resins market, known for its versatility and wide-ranging applications, is currently navigating the challenges posed by the emergence of alternative materials. As industries seek novel solutions and advancements, the market for phenolic resins is witnessing increased competition from substitutes, introducing complexities and strategic considerations for industry stakeholders.

The landscape of materials in industries like automotive, construction, and electronics is continuously evolving. New materials with properties comparable to or even surpassing those of phenolic resins have entered the scene, challenging the established market dynamics.

One of the primary challenges for the phenolic resins market is the development of alternative materials that offer comparable or superior performance characteristics. Innovations in materials science are driving the creation of substitutes that may be lighter, more cost-effective, or environmentally friendly, posing a threat to the traditional dominance of phenolic resins. Cost competitiveness is a critical factor influencing the substitution dynamics. If alternative materials can offer similar benefits at a lower cost, industries may be inclined to shift away from phenolic resins, impacting market share and profitability for phenolic resin manufacturers.

Key Market Trends

Advancement in Technology

In the dynamic landscape of industrial materials, technological advancements stand out as a key driver propelling the phenolic resins market forward. As research and development efforts continue to push the boundaries of material science, the evolving technologies surrounding phenolic resins are unlocking new possibilities and applications.

One of the primary ways technology is driving the phenolic resins market is through innovations in production processes.

Advanced manufacturing techniques, catalyzed by technological breakthroughs, are enhancing the efficiency and scalability of phenolic resin production. From novel catalysts to optimized reaction conditions, these innovations are contributing to a more sustainable and cost-effective manufacturing landscape.

Advancements in technology are instrumental in improving the performance characteristics of phenolic resins. Researchers and engineers are fine-tuning formulations to enhance properties such as mechanical strength, thermal stability, and flame resistance. These improvements not only meet the ever-growing demand for high-performance materials but also expand the range of applications across diverse industries.

The integration of nanotechnology is another noteworthy technological trend in the phenolic resins market. Nanoparticles, when incorporated into phenolic resins, can impart unique properties, such as increased strength and improved thermal conductivity.

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This level of customization allows for the development of tailored solutions that cater to specific industry requirements.

Focus on Lightweight Materials

The automotive sector, in particular, is a significant driver behind the demand for lightweight materials, and phenolic resins have stepped into the spotlight. Manufacturers are increasingly turning to phenolic resins to create lightweight composites for components such as interior panels, under-the-hood applications, and structural components. This not only contributes to fuel efficiency but also enhances the overall performance and sustainability of vehicles.

In the aerospace industry, where every ounce matters, phenolic resins are playing a crucial role in the development of lightweight materials for aircraft components. From interior structures to composite materials used in aircraft construction, phenolic resins offer the perfect balance of strength and weight, meeting the stringent requirements of the aerospace sector.

The construction industry is also leveraging the advantages of lightweight materials, and phenolic resins are finding applications in various construction materials. Lightweight panels, laminates, and insulation materials based on phenolic resins are gaining popularity for their ability to reduce the overall weight of structures while maintaining structural integrity and fire resistance.

Growing Focus on Fire Safety

Phenolic resins, derived from the condensation of phenol and formaldehyde, possess intrinsic flame-retardant characteristics. This fundamental property sets them apart in industries where fire safety standards are stringent. From construction materials to automotive components, the use of phenolic resins is instrumental in reducing the risk of fire and limiting the spread of flames. The National Fire Protection Association (NFPA) develops codes and standards aimed at reducing the risks and impacts of fires. Notable standards include NFPA 101 (Life Safety Code) and NFPA 72 (National Fire Alarm and Signaling Code). NFPA 101 (Life Safety Code): This code outlines requirements for building design, construction, operation, and maintenance to ensure a reasonable level of fire safety. It includes provisions for egress routes, fire protection systems, occupancy classifications, and emergency planning.

In the construction industry, where safety codes and regulations demand materials that can withstand fire hazards, phenolic resins have become a go-to choice. These resins find applications in fire-resistant coatings, laminates, and structural elements, contributing to the development of structures that prioritize safety without compromising on durability.

As awareness of fire safety grows globally, industries are aligning their practices with stringent safety standards. Phenolic resins, by providing an effective barrier against flames, offer a solution that meets and exceeds these standards. This is particularly crucial in applications where human safety and the protection of valuable assets are non-negotiable.

The emphasis on fire safety is driving innovation within the phenolic resins market. Research and development efforts are focused on enhancing the fire resistance of these resins further, ensuring that they remain at the forefront of materials used in critical applications.

Segmental Insights

Product Insights

Based on product, Novolac is the fastest-growing segment in the market in 2024. Novolac phenolic resins are known for their higher cross-link density, making them thermosetting polymers with enhanced heat resistance. They offer excellent chemical and corrosion resistance, making them ideal for coatings, adhesives, and molded components. These resins are often preferred where durability and chemical resistance are essential. Similarly, Resol phenolic resins are recognized for their heat resistance and adhesive properties. They undergo polymerization to form a three-dimensional network structure and are commonly used in molded components, laminates, and coatings, where thermal stability is crucial.

Regional Insights

The global phenolic resins market is experiencing a significant impetus, and a substantial driving force behind this surge is the active and strategic contribution of the Asia-Pacific region. As economies in Asia-Pacific continue to grow, the demand for phenolic resins across various industries has witnessed a remarkable uptick, shaping the trajectory of the global market. Asia-Pacific, encompassing powerhouse economies such as China, India, Japan, and South Korea, is witnessing rapid industrialization and ambitious infrastructure development projects. The construction sector, a major consumer of phenolic resins, has been flourishing, driving the demand for these versatile polymers in applications ranging from adhesives to coatings and laminates.

The automotive and electronics industries, crucial markets for phenolic resins, have been expanding exponentially in the Asia-Pacific region. As these industries adopt lightweight materials for enhanced efficiency and durability, phenolic resins, with

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their excellent mechanical and thermal properties, have become key components in manufacturing processes. Global players in the phenolic resins market are strategically investing in the Asia-Pacific region to capitalize on the burgeoning demand. Capacity expansions and new production facilities are being established to meet the growing requirements of industries in the region. This not only caters to local demand but also positions Asia-Pacific as a significant hub for global phenolic resin production. Asia-Pacific is increasingly focusing on sustainability and environmentally friendly solutions. This aligns with the global trend towards sustainable practices, prompting the development of bio-based phenolic resins and eco-friendly formulations. As regulatory pressures and consumer awareness grow, the region's commitment to sustainability is shaping the evolution of the phenolic resins market. The Asia-Pacific region serves as a crucial hub for global trade, facilitating the export and import of phenolic resins. This accessibility to markets enables seamless distribution and supply chain dynamics, ensuring that phenolic resins produced in the region reach industries across the globe.

Key Market Players

- DIC Corporation
- Kolon Industries, Inc.
- Sumitomo Bakelite Co., Ltd.
- Hexcel Corporation
- Georgia-Pacific Chemicals
- Kraton Corporation
- Hexion
- Bostik, Inc.
- SI Group, Inc.

Report Scope:

In this report, the Global Phenolic Resins Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□Phenolic Resins Market, By Product:

- o Novolac
- o Resol
- o Others

□□Phenolic Resins Market, By Application:

- o Wood Adhesives
- o Molding
- o Insulations
- o Laminates
- o Coatings
- o Paper Impregnation
- o Others

□□Phenolic Resins Market, By Region:

- o North America
 - United States
 - Canada
 - Mexico
- o Europe
 - France
 - United Kingdom
 - Italy
 - Germany
 - Spain
- o Asia-Pacific

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- China
- India
- Japan
- Australia
- South Korea
- o South America
- Brazil
- Argentina
- Colombia
- o Middle East & Africa
- South Africa
- Saudi Arabia
- UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Phenolic Resins Market.

Available Customizations:

Global Phenolic Resins market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

□□ Detailed analysis and profiling of additional market players (up to five).

Table of Contents:

1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations
2. Research Methodology
 - 2.1. Objective of the Study
 - 2.2. Baseline Methodology
 - 2.3. Key Industry Partners
 - 2.4. Major Association and Secondary Sources
 - 2.5. Forecasting Methodology
 - 2.6. Data Triangulation & Validation
 - 2.7. Assumptions and Limitations
3. Executive Summary
 - 3.1. Overview of the Market
 - 3.2. Overview of Key Market Segmentations
 - 3.3. Overview of Key Market Players
 - 3.4. Overview of Key Regions/Countries
 - 3.5. Overview of Market Drivers, Challenges, Trends
4. Impact of COVID-19 on Global Phenolic Resins Market
5. Global Phenolic Resins Market Outlook
 - 5.1. Market Size & Forecast
 - 5.1.1. By Value & Volume
 - 5.2. Market Share & Forecast

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- 5.2.1. By Product (Novolac, Resol, Others)
- 5.2.2. By Application (Wood Adhesives, Molding, insulations, Laminates, Coatings, Paper Impregnation, Others)
- 5.2.3. By Region
- 5.2.4. By Company (2024)
- 5.3. Market Map
- 6. Asia Pacific Phenolic Resins Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value & Volume
 - 6.2. Market Share & Forecast
 - 6.2.1. By Product
 - 6.2.2. By Application
 - 6.2.3. By Country
 - 6.3. Asia Pacific: Country Analysis
 - 6.3.1. China Phenolic Resins Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value & Volume
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Product
 - 6.3.1.2.2. By Application
 - 6.3.2. India Phenolic Resins Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value & Volume
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Product
 - 6.3.2.2.2. By Application
 - 6.3.3. Australia Phenolic Resins Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value & Volume
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Product
 - 6.3.3.2.2. By Application
 - 6.3.4. Japan Phenolic Resins Market Outlook
 - 6.3.4.1. Market Size & Forecast
 - 6.3.4.1.1. By Value & Volume
 - 6.3.4.2. Market Share & Forecast
 - 6.3.4.2.1. By Product
 - 6.3.4.2.2. By Application
 - 6.3.5. South Korea Phenolic Resins Market Outlook
 - 6.3.5.1. Market Size & Forecast
 - 6.3.5.1.1. By Value & Volume
 - 6.3.5.2. Market Share & Forecast
 - 6.3.5.2.1. By Product
 - 6.3.5.2.2. By Application
 - 7. Europe Phenolic Resins Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value & Volume
 - 7.2. Market Share & Forecast

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- 7.2.1. By Product
- 7.2.2. By Application
- 7.2.3. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. France Phenolic Resins Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value & Volume
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Product
 - 7.3.1.2.2. By Application
 - 7.3.2. Germany Phenolic Resins Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value & Volume
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Product
 - 7.3.2.2.2. By Application
 - 7.3.3. Spain Phenolic Resins Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value & Volume
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Product
 - 7.3.3.2.2. By Application
 - 7.3.4. Italy Phenolic Resins Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value & Volume
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product
 - 7.3.4.2.2. By Application
 - 7.3.5. United Kingdom Phenolic Resins Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value & Volume
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Product
 - 7.3.5.2.2. By Application
- 8. North America Phenolic Resins Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value & Volume
 - 8.2. Market Share & Forecast
 - 8.2.1. By Product
 - 8.2.2. By Application
 - 8.2.3. By Country
 - 8.3. North America: Country Analysis
 - 8.3.1. United States Phenolic Resins Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value & Volume
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product

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- 8.3.1.2.2. By Application
- 8.3.2. Mexico Phenolic Resins Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value & Volume
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product
 - 8.3.2.2.2. By Application
- 8.3.3. Canada Phenolic Resins Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value & Volume
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product
 - 8.3.3.2.2. By Application
- 9. South America Phenolic Resins Market Outlook
 - 9.1. Market Size & Forecast
 - 9.1.1. By Value & Volume
 - 9.2. Market Share & Forecast
 - 9.2.1. By Product
 - 9.2.2. By Application
 - 9.2.3. By Country
 - 9.3. South America: Country Analysis
 - 9.3.1. Brazil Phenolic Resins Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value & Volume
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product
 - 9.3.1.2.2. By Application
 - 9.3.2. Argentina Phenolic Resins Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value & Volume
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product
 - 9.3.2.2.2. By Application
 - 9.3.3. Colombia Phenolic Resins Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value & Volume
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Product
 - 9.3.3.2.2. By Application
- 10. Middle East and Africa Phenolic Resins Market Outlook
 - 10.1. Market Size & Forecast
 - 10.1.1. By Value & Volume
 - 10.2. Market Share & Forecast
 - 10.2.1. By Product
 - 10.2.2. By Application
 - 10.2.3. By Country
 - 10.3. MEA: Country Analysis

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- 10.3.1. South Africa Phenolic Resins Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value & Volume
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Product
 - 10.3.1.2.2. By Application
- 10.3.2. Saudi Arabia Phenolic Resins Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value & Volume
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Product
 - 10.3.2.2.2. By Application
- 10.3.3. UAE Phenolic Resins Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value & Volume
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Product
 - 10.3.3.2.2. By Application
- 11. Market Dynamics
 - 11.1. Drivers
 - 11.2. Challenges
- 12. Market Trends & Developments
 - 12.1. Recent Developments
 - 12.2. Product Launches
 - 12.3. Mergers & Acquisitions
- 13. Global Phenolic Resins Market: SWOT Analysis
- 14. Porter's Five Forces Analysis
 - 14.1. Competition in the Industry
 - 14.2. Potential of New Entrants
 - 14.3. Power of Suppliers
 - 14.4. Power of Customers
 - 14.5. Threat of Substitute Product
- 15. PESTLE Analysis
- 16. Pricing Analysis
- 17. Competitive Landscape
 - 17.1. DIC Corporation
 - 17.1.1. Business Overview
 - 17.1.2. Company Snapshot
 - 17.1.3. Products & Services
 - 17.1.4. Financials (As Reported)
 - 17.1.5. Recent Developments
 - 17.2. Kolon Industries, Inc.
 - 17.3. Sumitomo Bakelite Co., Ltd.
 - 17.4. Hexcel Corporation
 - 17.5. Georgia-Pacific Chemicals
 - 17.6. KRATON CORPORATION
 - 17.7. Hexion

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- 17.8. Bostik, Inc.
- 17.9. SI Group, Inc.
- 18. Strategic Recommendations
- 19. About Us & Disclaimer

Phenolic Resins Market - Global Industry Size, Share, Trends, Opportunity, & Forecast Segmented By Product (Novolac, Resol, Others), By Application (Wood Adhesives, Molding, insulations, Laminates, Coatings, Paper Impregnation, Others), By Region & Competition, 2020-2030F

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