

Cashew Nutshell Liquid Market by Product (PF Resins, Epoxy Resins, Epoxy Curing Agents, Surfactants, Polyols, Friction Linings), Application (Adhesive, Coating, Foam & Insulation, Laminate, Personal Care, Fuel), Region (Asia Pacific, North America, Europe, Middle East & Africa, South America) - Global Forecast to 2030

Market Report | 2025-08-04 | 250 pages | MarketsandMarkets

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Report description:

The CNSL market is expected to grow at a rate of 11.36% between 2025 and 2030, projected to be USD 876.5 million globally by 2030. It is gaining high demand in the following applications, i.e., adhesives, coatings, foams, insulation, surfactants, and laminates. Of these, coatings had the highest share of USD 130.0 million in 2024 and that of the adhesives was USD 113.0 million. Its eco-friendly, renewable character, high thermal and chemical stability, compatibility with numerous polymers and resins are the main qualities of CNSL-based coatings and adhesives which predetermine their demand in the market.

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The phenolic compounds present in CNSL enhance the outcomes of better bonding strength and durability, which makes it ideal in the automotive, construction, and electronics sectors. Besides, environmental issues and increased regulatory pressure of petroleum-based chemicals have started changing preferences among manufacturers to bio-based products like CNSL. The growth is also devoid of the fact that sustainable and cost-effective materials are gaining positive affinities in the industrial and consumer product formulations.

"Phenol formaldehyde resins and epoxy systems were leading product types in the CNSL market, 2024"

Phenol Formaldehyde (PF) resins have the largest share of CNSL market by product type valued at USD 76.3 million in 2024 and are closely followed by epoxy modifiers & resins and curing agents with a value of USD 76.2 million and USD 75.9 million,

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respectively. There are such product types which can take advantage of CNSL reactive phenolic structure, so that it could be used as a strong and flexible chemical intermediating in resin and plastic compounding.

The escalating need for high performance, heat-resistant and sustainable materials in the manufacturing industries starting with electronics to automotive industries then to construction industries is boosting the use of the CNSL-derived PF and epoxy systems. Specifically, CNSL-based curing agents are picking up popularity as they have the advantage of low toxicity and biodegradability, and thus, they can substitute the traditional amine-based systems offering a safer option. Also, polyols & NCO blocking agents and friction materials are experiencing high demand because they are important in brake linings, clutches, and polyurethane foams. With the growing interest of industries in the use of bio-based feedstocks as raw materials in making high-performance products, CNSL-based products come as perfect green alternatives to existing raw materials which meet the demands of sustainability that the world is gearing toward.

"Europe dominated the global CNSL market in 2024, driven by sustainable regulations and industrial innovation"

The European market is the most significant regional CNSL market. This is principally because of its strict policies on environment, the already developed manufacturing facilities and its active pursuit of bio-based chemicals. Consistency has been witnessed in the demand for the region in applications, such as coatings, adhesives, epoxy systems, and friction materials, especially in automotive, construction, and electronic industries. Green Deal and circular economy indicators in the EU with reliance on petroleum-based raw materials have been replaced by renewable sources such as CNSL.

In Germany, France, and the Netherlands, manufacturers are also taking advantage of the renewability of the phenolic content in CNSL to compile resins, coatings, and insulation materials that are free of formaldehyde and low in volatile organic compounds (VOCs), as well as environmentally harmless. In addition to this, the use of CNSL in automotive friction materials (such as brake pads, clutch plates) also suits well the trend of automotive innovations in Europe and its policy toward carbon emission reductions.

In-depth interviews have been conducted with chief executive officers (CEOs), Directors, and other executives from various key organizations operating in the CNSL marketplace.

-□By Company Type: Tier 1 - 55%, Tier 2 - 25%, and Tier 3 - 20%

-□By Designation: Directors - 50%, Managers - 30%, and Others - 20%

-□By Region: North America - 40%, Europe - 35%, Asia Pacific - 20%, Rest of the World - 5%

The key players profiled in the report include Cardolite Corporation (US), GHW (Vietnam) Co. Ltd., Palmer International (US), LC Buffalo Co.Ltd. (Vietnam), Cat Loi Cashew Oil Production & Export Joint Stock Company (Vietnam), Senese (Poland), Zhejiang Wansheng Co., Ltd. (China), Cashew Chem India (India), Sri Devi Group (India), and ADMARK Polycoats Pvt. Ltd. (India).

Research Coverage

This report segments the market for CNSL based on product type, application, and region and provides estimations of value (USD Million) for the overall market size across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, services, and key strategies, associated with the market for CNSL.

Reasons to Buy this Report

This research report is focused on various levels of analyses - industry analysis (industry trends), market share analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the CNSL market; high-growth regions; and market drivers, restraints, and opportunities.

The report provides insights into the following points:

-□Market Penetration: Comprehensive information on CNSL offered by top players in the global market.

-□Analysis of key drivers: (Increasing preference for bio-based alternatives, growing government initiatives supporting the cashew industry) restraints (Emissions and fume release during processing, lack of standardization and inconsistent quality) opportunities (CNSL biofuel blends for marine fuel) and challenges (availability of substitutes) influencing the growth of CNSL market.

-□Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new

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product & service launches in the CNSL market.

-□Market Development: Comprehensive information about lucrative emerging markets - the report analyzes the markets for CNSL across regions.

□

-□Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global CNSL market.

-□Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the CNSL market.

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