

Global Novolac Epoxy Resin Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Novolac Epoxy Resin market size is expected to reach \$ 1075 million by 2032, rising at a market growth of 4.6% CAGR during the forecast period (2026-2032).

Novolac Epoxy Resin refers to a family of multifunctional epoxy resins produced from phenolic novolac structures and epichlorohydrin. The products contain more than two reactive epoxy groups per molecule and develop a densely cross-linked network after curing, providing elevated heat resistance, chemical resistance, dimensional stability and electrical reliability. The research scope covers phenol novolac epoxy resin, cresol novolac epoxy resin, bisphenol A novolac epoxy resin and other commercially supplied novolac structures, including naphthalene-containing, brominated and other modified grades. Commercial forms include liquid, semi-solid, solid and solution products. Solution and water-dispersed products are measured by their actual as-delivered weight. Major applications include semiconductor encapsulation, printed circuit materials, chemical-resistant coatings, industrial linings, composites and adhesives. Current producer documentation confirms that industrial grades are used extensively in coatings, linings and composite systems, while cresol, low-chlorine and other high-purity grades are concentrated in semiconductor and printed circuit applications.

Key Findings

Global shipment volume reached approximately 152,560 metric tons in 2025

Average 2025 EXW price was approximately US\$4,599 per metric ton

China accounted for approximately 41% of global shipment volume

Phenol novolac epoxy resin represented approximately 39% of volume

Printed circuit materials represented approximately 32% of demand

The estimated CR5 was 51%, indicating moderate market concentration

Market Trends

Novolac Epoxy Resin development is moving toward higher purity, lower hydrolysable chlorine, tighter molecular-weight distribution and more specialized molecular structures. Semiconductor packaging and advanced printed circuit materials increasingly require resins with controlled softening points, low ionic impurities, low moisture absorption and stable processing windows. Japanese and East Asian suppliers continue to develop cresol, naphthalene-containing and other high-functionality grades, while industrial suppliers are expanding lower-viscosity, solution, waterborne and lower-VOC products for coatings and composites. The market is therefore separating into standardized industrial grades and qualification-intensive electronic grades with materially different pricing and customer requirements.

Market Dynamics

Drivers

Demand is supported by growth in high-layer-count printed circuit boards, semiconductor encapsulation, electronic laminates and chemically resistant industrial systems. High cross-link density makes Novolac Epoxy Resin suitable for applications requiring heat resistance, solvent resistance and long-term dimensional stability. Wider use of servers, automotive electronics and high-reliability electrical equipment is increasing demand for low-chlorine and high-purity grades.

Restrains

The main constraints are raw-material volatility, energy-intensive purification, environmental compliance costs and long qualification periods for electronic grades. Epichlorohydrin, phenol, cresol and solvents can produce substantial swings in

manufacturing costs, while solution grades create additional exposure to solvent prices and transport efficiency. Price competition is stronger in standard phenol novolac products, limiting the ability of producers to pass through cost increases immediately.

Opportunities

The strongest opportunities are in low-chlorine resins, high-purity cresol novolac grades, high-temperature printed circuit materials and special naphthalene or multifunctional structures. Chinese producers are increasing commercial supply of BPA novolac, phenol novolac and cresol novolac products, creating opportunities for local qualification and import substitution. Industrial opportunities remain in chemical processing, marine protection, tank linings and high-temperature composites.

Challenges

Electronic-grade products require consistent impurity control, molecular structure, viscosity and batch-to-batch performance. Customer approval can take an extended period, and announced capacity does not immediately translate into qualified sales. Producers must also manage increasingly differentiated portfolios without sacrificing utilization rates, while customers can reformulate standard industrial systems when price gaps become excessive. Tongyu's regulatory filings show that stable mass production and customer validation are central barriers in high-performance electronic resins.

Industry Chain Analysis

The upstream chain consists primarily of phenol, cresols, bisphenol A, formaldehyde, epichlorohydrin, catalysts and formulation solvents. Raw-material selection determines the main resin backbone, while epoxidation, purification and molecular-weight control establish epoxy functionality, chlorine content, viscosity and softening point. Solution products add solvent selection and non-volatile-content control to the cost structure. Current commercial documentation shows that the same base resin may be delivered as a semi-solid product or as an acetone, methyl ethyl ketone or other solvent solution.

Midstream value creation is concentrated in structure design, impurity removal, production consistency and application qualification. Industrial grades compete mainly through cost, handling performance and global distribution. Electronic grades derive a

larger share of value from low chlorine, controlled thermal properties, reliability and customer-specific validation. Downstream customers include epoxy molding compound producers, copper-clad laminate manufacturers, coating formulators, industrial lining contractors, composite material suppliers and adhesive manufacturers.

Segment Insights

Phenol Novolac Epoxy Resin accounted for approximately 39% of 2025 shipment volume and remained the largest chemistry segment because of its broad use in coatings, linings, composites, laminates and adhesives.

Downstream Market Opportunities

Printed circuit materials market is supported by higher thermal and reliability requirements in multilayer boards, high-speed communication equipment and electronic substrates. Composite and adhesive applications offer selective opportunities where high-temperature performance and chemical resistance justify a premium over conventional epoxy resins.

Regional Insights

China was the largest demand market. The region benefits from a large printed circuit, copper-clad laminate and electronic material manufacturing base, while domestic Novolac Epoxy Resin supply is increasing. The rest of Indo-Pacific represented approximately one-third of volume and a higher proportion of value because Japan, South Korea and Taiwan have a greater concentration of high-purity electronic grades.

North America and Europe demand mix is more balanced across protective coatings, industrial linings, composites, electrical laminates and specialty electronics. The Middle East, CIS, Latin America and Africa collectively represented a smaller share, with demand concentrated in oil and gas infrastructure, chemical processing, marine protection and industrial maintenance.

Competitive Landscape Analysis

The global Novolac Epoxy Resin market is moderately concentrated. Olin, Westlake

and Huntsman maintain broad industrial portfolios and international distribution, while DIC, KUKDO Chemical, Nippon Kayaku, NIPPON STEEL Chemical & Material, Mitsubishi Chemical, Chang Chun Plastics and Nan Ya Plastics have strong positions in electronic and multifunctional grades. Chinese producers including Shengquan Group, Tongyu Advanced Materials, Dalian Qihua New Material and Shanghai Resicare New Materials are expanding product breadth and customer qualification. Competitive advantage in industrial grades is driven by cost, scale and distribution. In electronic grades, purity, batch stability, product design and customer approval are more important than nominal capacity.

Report Scope

This report studies the global Novolac Epoxy Resin production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Novolac Epoxy Resin and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Novolac Epoxy Resin that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Novolac Epoxy Resin total production and demand, 2021-2032, (Kilotons)

Global Novolac Epoxy Resin total production value, 2021-2032, (USD Million)

Global Novolac Epoxy Resin production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Novolac Epoxy Resin consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Novolac Epoxy Resin domestic production, consumption, key domestic manufacturers and share

Global Novolac Epoxy Resin production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Novolac Epoxy Resin production by Chemistry, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Novolac Epoxy Resin production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Novolac Epoxy Resin market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Olin Corporation, DIC Corporation, Nan Ya Plastics, KUKDO Chemical, Huntsman Corporation, Chang Chun Plastics, Westlake Corporation, Tongyu Advanced Materials, Sinopec, Shengquan Group, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Novolac Epoxy Resin market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) by manufacturer, by Chemistry, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Novolac Epoxy Resin Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Novolac Epoxy Resin Market, Segmentation by Chemistry:

Phenol Novolac Epoxy Resin

o-Cresol Novolac Epoxy Resin

Bisphenol A Novolac Epoxy Resin

Other

Global Novolac Epoxy Resin Market, Segmentation by Form:

Liquid

Solid

Global Novolac Epoxy Resin Market, Segmentation by Channel:

Direct Sale

Indirect Sale

Global Novolac Epoxy Resin Market, Segmentation by Application:

Semiconductor Packaging

Printed Circuit Materials

Protective Coatings

Industrial Linings

Composites

Adhesives

Other Applications

Companies Profiled:

Olin Corporation

DIC Corporation

Nan Ya Plastics

KUKDO Chemical

Huntsman Corporation

Chang Chun Plastics

Westlake Corporation

Tongyu Advanced Materials

Sinopec

Shengquan Group

Dalian Qihua New Material

Shanghai Resicare New Materials

Shandong Deyuan Epoxy Technology

Key Questions Answered:

1. How big is the global Novolac Epoxy Resin market?
2. What is the demand of the global Novolac Epoxy Resin market?
3. What is the year over year growth of the global Novolac Epoxy Resin market?
4. What is the production and production value of the global Novolac Epoxy Resin market?
5. Who are the key producers in the global Novolac Epoxy Resin market?
6. What are the growth factors driving the market demand?

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