

# Global Phenolic Cotton Sheet Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G84285A5E49DEN.html>

Date: May 2026

Pages: 163

Price: US\$ 4,480.00 (Single User License)

ID: G84285A5E49DEN

## Abstracts

The global Phenolic Cotton Sheet market size is expected to reach \$ 144 million by 2032, rising at a market growth of 3.1% CAGR during the forecast period (2026-2032).

In 2025, global sales of Phenolic Cotton Sheets reached approximately 29.5 k tons, with an average market price of about USD 3.81 kg, an annual production capacity of roughly 33 k tons, and an industry-average gross margin of approximately 25%.

Phenolic Cotton Sheets are thermosetting laminated sheets used for industrial insulation and machinery. They typically use cotton cloth, cotton fabric, or cotton canvas as the reinforcing substrate and phenolic resin as the bonding matrix, formed through resin impregnation, drying, lamination, high-temperature and high-pressure hot pressing curing, and post-treatment. Typical grades of this type of product include F850/PFCC201, F852/PFCC202, F851/PFCC203, F853/PFCC204, PFCC305, HGW2082, 3025, and NEMA C/CE/L/LE, among others. These cotton-based phenolic laminates possess good mechanical strength, electrical insulation, heat resistance, abrasion resistance, dimensional stability, and machinability. They are mainly used in electrical switchboards, transformer and motor insulation, circuit breakers, fuse supports, terminal blocks, busbar supports, mechanical wear-resistant parts, gears, bushings, pads, and industrial insulating structural components.

Based on our research, Phenolic Cotton Sheet represent a mature and narrowly defined industrial material segment rather than a broad “phenolic sheet” market. The core product is a cotton-fabric-reinforced phenolic thermoset laminate used primarily in mechanical wear parts, moderate electrical insulation and machined industrial components. Its market boundary is shaped by long-established grade systems such as NEMA C/CE/L/LE, IEC PFCC grades, European HGW grades and China’s 3025/3026

series. Purchasing decisions are typically driven by grade equivalence, fabric weave, thickness tolerance, mechanical strength, machinability, moisture behavior and application-specific wear performance. Compared with paper-based phenolic laminates, cotton fabric grades offer stronger impact resistance and wear performance; compared with epoxy glass laminates, they generally offer lower electrical and moisture performance but remain attractive for cost-sensitive, machinable and low-noise mechanical applications. Therefore, the market should be measured on a narrow basis covering cotton-fabric-reinforced phenolic sheets and plates, rather than combining them with paper phenolic sheets, FR-4/G10 epoxy glass laminates, decorative high-pressure laminates or downstream machined parts.

From the supply side, the global competitive structure is best described as a mix of a few international industrial laminate brands, regional specialist manufacturers and a large base of local small and medium-sized producers. North America, the United Kingdom, continental Europe, Japan and Taiwan retain recognized product families with relatively clear grade systems and stronger links to industrial maintenance, rail, electrical insulation and engineered wear components. China and India supply a substantial portion of standard-grade materials, especially 3025/3026, PFCC, Hylam-type and fabric phenolic grades used in general industrial applications. The difference between the broad longlist and the core formal list is significant because many market participants are distributors, stockists, CNC fabricators or exporters of third-party materials rather than sheet manufacturers. For China and India in particular, a conservative research design must retain small verified producers while separating those with only trading-platform or indirect evidence into a watchlist.

On the demand side, the market is driven more by replacement, maintenance and industrial component demand than by breakthrough new applications. Gears, bearings, bushings, cams, friction wheels, wear pads and machine support parts form the main mechanical demand base, while motors, transformers, switchgear, low-voltage insulating supports and electrical fixtures provide stable electrical demand. Standard sheet demand is supported by industrialization and equipment maintenance in China, India and Southeast Asia, while Europe, the United States and Japan retain demand for higher-grade, smaller-batch and certification-sensitive materials. Because many end uses are linked to installed industrial equipment and replacement parts, demand tends to be steadier than high-growth electronic materials markets, but the same installed-base nature also limits the possibility of rapid volume expansion.

This report studies the global Phenolic Cotton Sheet production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Phenolic Cotton Sheet 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 Phenolic Cotton Sheet that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Phenolic Cotton Sheet total production and demand, 2021-2032, (Kilotons)

Global Phenolic Cotton Sheet total production value, 2021-2032, (USD Million)

Global Phenolic Cotton Sheet production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Phenolic Cotton Sheet consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Phenolic Cotton Sheet domestic production, consumption, key domestic manufacturers and share

Global Phenolic Cotton Sheet production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Phenolic Cotton Sheet production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Phenolic Cotton Sheet production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Phenolic Cotton Sheet 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 Norplex-Micarta, Beijing Friend Group, Tufnol Composites, ISOVOLTA AG, Von Roll, ITEN Industries, Attwater Group, Accurate Plastics / Acculam, Spaulding Composites, Franklin Fibre-Lamitex, 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 Phenolic Cotton Sheet 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 Type, 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 Phenolic Cotton Sheet Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Phenolic Cotton Sheet Market, Segmentation by Type:

Coarse Weave Cotton Fabric

Medium Weave Cotton Fabric

Fine Weave Cotton Fabric

#### Global Phenolic Cotton Sheet Market, Segmentation by Friend Group Benchmark Grade:

F850 / PFCC201 Equivalent

F852 / PFCC202 Equivalent

F851 / PFCC203 Equivalent

Others

Global Phenolic Cotton Sheet Market, Segmentation by Form:

Thick Plates

Thin Sheets

Global Phenolic Cotton Sheet Market, Segmentation by Application:

Industrial Machinery

Electrical Equipment

Others

Companies Profiled:

Norplex-Micarta

Beijing Friend Group

Tufnol Composites

ISOVOLTA AG

Von Roll

ITEN Industries

Attwater Group

Accurate Plastics / Acculam

Spaulding Composites

Franklin Fibre-Lamitex

Futamura Chemical

Risho Kogyo

Qingdao Tainuo

SHANDONG AOXING

Xuchang Jingwei

Beijing Red Sun Technology / RDS

Hon Tai Material

Jiangyin Hucheng Insulation Materials

Lamtuf

Yangzhou Tuoteng

Henan Jinzhi

Hangzhou Liansheng

Shenzhen Zhongke Hengrun

Hebei Jinghong Electronic

#### Key Questions Answered:

1. How big is the global Phenolic Cotton Sheet market?
2. What is the demand of the global Phenolic Cotton Sheet market?
3. What is the year over year growth of the global Phenolic Cotton Sheet market?
4. What is the production and production value of the global Phenolic Cotton Sheet

market?

5. Who are the key producers in the global Phenolic Cotton Sheet market?

6. What are the growth factors driving the market demand?

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