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Global Phenolic Resin for Carbon-Carbon Composite Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Phenolic Resin for Carbon-Carbon Composite market size is expected to reach $ 56.34 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

Phenolic resins for carbon-carbon composites are a class of thermosetting phenolic resins with high carbon yield, specifically designed for the fabrication of carbon/carbon composites; they serve primarily as impregnating resins for carbon fiber preforms, molding binders, and precursors for the carbon matrix. By precisely controlling parameters such as molecular structure, solids content, viscosity, gel time, and impurity levels, these products are engineered to exhibit excellent carbon fiber wettability, favorable molding and processing characteristics, and a high carbonization yield.

Key Findings

Resole Phenolic Resin and Novolac Phenolic Resin constitute the principal product categories

High carbon retention and effective impregnation performance remain key directions for product development

Aerospace represents an important high-performance application for carbon-carbon composite materials

Competition focuses strongly on formulation capability and compatibility with downstream carbonization processes

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The global supplier base includes international specialty resin companies and Chinese manufacturers

Market Trends

Phenolic Resin for Carbon-Carbon Composite is developing toward higher carbon retention, improved impregnation, more stable carbonization behavior, and tighter impurity control. Downstream customers are placing greater emphasis on resin penetration into complex carbon-fiber preforms and consistent performance through repeated curing and carbonization cycles, encouraging a shift from general-purpose phenolic systems toward formulations specifically optimized for carbon-carbon manufacturing processes.

Market Dynamics

Drivers

Continued adoption of carbon-carbon composites in Aerospace, Transportation, and high-temperature Industrial Equipment supports sustained demand for specialized phenolic resin. As carbon-carbon components move toward higher operating temperatures, greater reliability, and longer service life, manufacturers require improved carbon-matrix density, carbonization stability, and production consistency, supporting further development of dedicated resin systems for impregnation and carbonization.

Restraints

Resin impregnation and carbonization require curing, pyrolysis, and potentially multiple densification cycles, resulting in relatively long processing periods and significant energy consumption. Phenolic resin also releases volatile components, undergoes dimensional shrinkage, and can generate additional porosity during pyrolysis, requiring coordinated control of resin formulation and processing conditions. Alternative densification technologies such as CVI also limit resin penetration in certain carbon-carbon manufacturing routes.

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Opportunities

Improving effective carbon retention and densification efficiency after each impregnation cycle represents an important product-development opportunity. Low-viscosity, high-penetration resin systems tailored to different preform pore structures can improve manufacturing efficiency and reduce subsequent densification requirements. Increasing material-consistency requirements in high-specification aerospace components, advanced braking systems, and high-temperature industrial components also create opportunities for customized phenolic resin with stronger technical barriers.

Challenges

The market has strong customer-specific and process-dependent characteristics because different carbon-fiber architectures, preform densities, curing conditions, and carbonization schedules may require different resin formulations. Manufacturers must control chemical properties, processing behavior, and the performance of the carbon matrix after pyrolysis simultaneously. Relatively long product qualification cycles, changes in downstream manufacturing routes, competing densification technologies, and the absence of fully standardized evaluation criteria across customers remain major industry challenges.

Industry Chain Analysis

The upstream industry primarily includes phenol, formaldehyde, catalyst, solvent, and functional modifier. Midstream production involves condensation polymerization, molecular-structure control, formulation development, viscosity adjustment, and purification to manufacture Resole Phenolic Resin and Novolac Phenolic Resin. Formulations are further adjusted according to different carbon-carbon manufacturing processes. The technical value of the resin is primarily reflected in stable impregnation, controllable curing, effective conversion into carbon, and impurity management.

Downstream carbon-carbon composite and component manufacturers convert phenolic resin into a carbon matrix through impregnation, curing, carbonization, and subsequent densification. Value creation therefore shifts progressively from basic chemical feedstock toward specialized resin formulation, compatibility with carbonization processes, and final component reliability. Resin manufacturers with consistent formulation capabilities, stable quality, and the ability to conduct joint downstream

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process validation are better positioned to establish long-term customer relationships.

Segment Insights

By resin type, Phenolic Resin for Carbon-Carbon Composite is primarily divided into Resole Phenolic Resin and Novolac Phenolic Resin. Resole Phenolic Resin can be formulated as a liquid system suitable for impregnation and forms a crosslinked structure through thermosetting reactions, providing strong process compatibility with carbon-fiber preform impregnation and subsequent carbonization. Novolac Phenolic Resin offers additional formulation flexibility through curing agent, solvent, and other formulation components and is used in carbon-carbon systems requiring specific forming windows and carbonization behavior.

Future product competition is expected to focus increasingly on overall performance throughout the carbon-carbon manufacturing cycle rather than on a single resin property. Products that combine effective impregnation, stable curing, carbon retention after pyrolysis, and low impurity levels are better positioned to enter demanding application supply chains.

Downstream Market Opportunities

Aerospace places stringent requirements on high-temperature resistance, ablation resistance, and structural reliability and therefore remains an important direction for technical upgrading of specialized phenolic resin. Transportation focuses more on stable manufacturing and cost efficiency for carbon-carbon braking components, while Industrial Equipment generates demand for structural and functional carbon-carbon components used in high-temperature environments. As carbon-carbon manufacturing efficiency improves, resin systems that balance performance with processing economics have additional expansion potential.

Regional Insights

Asia-Pacific has developed an extensive industrial base for phenolic resin and carbon material, with confirmed manufacturers located in China, Japan, and South Korea. North America also maintains an established specialty phenolic resin supply base serving advanced material applications. Regional competitive priorities differ, with Asian supply chains emphasizing manufacturing integration and localization, while high-

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specification applications place greater weight on qualification, quality consistency, and long-term supply reliability.

Competitive Landscape Analysis

Phenolic Resin for Carbon-Carbon Composite is characterized by specialized competition. Confirmed manufacturers include Sumitomo Bakelite, Bakelite Synthetics, KOLON Industries, SI Group, DIC, Jinan Shengquan Group, and Willing New Materials Technology. Competition centers on formulation capability, carbon-material impregnation, carbon retention after pyrolysis, quality consistency, and compatibility with customer processes rather than commodity phenolic resin capacity alone. International manufacturers benefit from established specialty resin technology platforms, while Chinese manufacturers leverage domestic phenolic resin and carbon-material supply chains to strengthen localized supply capabilities.

Report Scope

This report studies the global Phenolic Resin for Carbon-Carbon Composite production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Phenolic Resin for Carbon-Carbon Composite total production and demand, 2021-2032, (Tons)

Global Phenolic Resin for Carbon-Carbon Composite total production value, 2021-2032, (USD Million)

Global Phenolic Resin for Carbon-Carbon Composite production by region &

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country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Phenolic Resin for Carbon-Carbon Composite consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Phenolic Resin for Carbon-Carbon Composite domestic production, consumption, key domestic manufacturers and share

Global Phenolic Resin for Carbon-Carbon Composite production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Phenolic Resin for Carbon-Carbon Composite production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Phenolic Resin for Carbon-Carbon Composite production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Phenolic Resin for Carbon-Carbon Composite 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 Sumitomo Bakelite, Bakelite Synthetics, KOLON Industries, SI Group, DIC, Jinan Shengquan Group, Willing New Materials Technology, 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 Resin for Carbon-Carbon Composite market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by

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year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Phenolic Resin for Carbon-Carbon Composite Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Phenolic Resin for Carbon-Carbon Composite Market, Segmentation by Type:

Resole Phenolic Resin

Novolac Phenolic Resin

Global Phenolic Resin for Carbon-Carbon Composite Market, Segmentation by Form:

Liquid Type

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Solid Type

Global Phenolic Resin for Carbon-Carbon Composite Market, Segmentation by Application:

Aerospace

Transportation

Industrial Equipment

Other

Companies Profiled:

Sumitomo Bakelite

Bakelite Synthetics

KOLON Industries

SI Group

DIC

Jinan Shengquan Group

Willing New Materials Technology

Key Questions Answered

1. How big is the global Phenolic Resin for Carbon-Carbon Composite market?
2. What is the demand of the global Phenolic Resin for Carbon-Carbon Composite market?

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3. What is the year over year growth of the global Phenolic Resin for Carbon-Carbon Composite market?
4. What is the total value of the global Phenolic Resin for Carbon-Carbon Composite market?
5. Who are the Major Players in the global Phenolic Resin for Carbon-Carbon Composite market?
6. What are the growth factors driving the market demand?

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