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Global Phenolic Resin for Carbon-Carbon Composite Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Phenolic Resin for Carbon-Carbon Composite market size was valued at US$ 34.78 million in 2025 and is forecast to a readjusted size of US$ 56.34 million by 2032 with a CAGR of 7.3% during review period.

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

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

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

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formulation capabilities, stable quality, and the ability to conduct joint downstream 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

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supply chains emphasizing manufacturing integration and localization, while high-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 is a detailed and comprehensive analysis for global Phenolic Resin for Carbon-Carbon Composite market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Phenolic Resin for Carbon-Carbon Composite market size and forecasts, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/Ton), 2021-2032

Global Phenolic Resin for Carbon-Carbon Composite market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/Ton), 2021-2032

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Global Phenolic Resin for Carbon-Carbon Composite market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/Ton), 2021-2032

Global Phenolic Resin for Carbon-Carbon Composite market shares of main players, shipments in revenue ($ Million), sales quantity (Tons), and ASP (US$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Phenolic Resin for Carbon-Carbon Composite

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Phenolic Resin for Carbon-Carbon Composite market based on the following parameters - company overview, sales quantity, revenue, 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.

Phenolic Resin for Carbon-Carbon Composite market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

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Market segment by Type

Resole Phenolic Resin

Novolac Phenolic Resin

Market segment by Form

Liquid Type

Solid Type

Market segment by Application

Aerospace

Transportation

Industrial Equipment

Other

Major players covered

Sumitomo Bakelite

Bakelite Synthetics

KOLON Industries

SI Group

DIC

Jinan Shengquan Group

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Willing New Materials Technology

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Phenolic Resin for Carbon-Carbon Composite product scope, market overview, market estimation caveats and base year.
Chapter 2, to profile the top manufacturers of Phenolic Resin for Carbon-Carbon Composite, with price, sales quantity, revenue, and global market share of Phenolic Resin for Carbon-Carbon Composite from 2021 to 2026.
Chapter 3, the Phenolic Resin for Carbon-Carbon Composite competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.
Chapter 4, the Phenolic Resin for Carbon-Carbon Composite breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.
Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.
Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Phenolic Resin for Carbon-Carbon Composite market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.
Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces

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analysis.
Chapter 13, the key raw materials and key suppliers, and industry chain of Phenolic Resin for Carbon-Carbon Composite.
Chapter 14 and 15, to describe Phenolic Resin for Carbon-Carbon Composite sales channel, distributors, customers, research findings and conclusion.

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Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope
1.2 Market Estimation Caveats and Base Year
1.3 Market Analysis by Type
  1.3.1 Overview: Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Type: 2021 Versus 2025 Versus 2032
  1.3.2 Resole Phenolic Resin
  1.3.3 Novolac Phenolic Resin
1.4 Market Analysis by Form
  1.4.1 Overview: Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Form: 2021 Versus 2025 Versus 2032
  1.4.2 Liquid Type
  1.4.3 Solid Type
1.5 Market Analysis by Application
  1.5.1 Overview: Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Application: 2021 Versus 2025 Versus 2032
  1.5.2 Aerospace
  1.5.3 Transportation
  1.5.4 Industrial Equipment
  1.5.5 Other
1.6 Global Phenolic Resin for Carbon-Carbon Composite Market Size & Forecast
  1.6.1 Global Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021 & 2025 & 2032)
  1.6.2 Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity (2021-2032)
  1.6.3 Global Phenolic Resin for Carbon-Carbon Composite Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Sumitomo Bakelite
  2.1.1 Sumitomo Bakelite Details
  2.1.2 Sumitomo Bakelite Major Business
  2.1.3 Sumitomo Bakelite Phenolic Resin for Carbon-Carbon Composite Product and Services
  2.1.4 Sumitomo Bakelite Phenolic Resin for Carbon-Carbon Composite Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

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info@marketpublishers.com

2.1.5 Sumitomo Bakelite Recent Developments/Updates
2.2 Bakelite Synthetics
2.2.1 Bakelite Synthetics Details
2.2.2 Bakelite Synthetics Major Business
2.2.3 Bakelite Synthetics Phenolic Resin for Carbon-Carbon Composite Product and Services
2.2.4 Bakelite Synthetics Phenolic Resin for Carbon-Carbon Composite Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.2.5 Bakelite Synthetics Recent Developments/Updates
2.3 KOLON Industries
2.3.1 KOLON Industries Details
2.3.2 KOLON Industries Major Business
2.3.3 KOLON Industries Phenolic Resin for Carbon-Carbon Composite Product and Services
2.3.4 KOLON Industries Phenolic Resin for Carbon-Carbon Composite Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.3.5 KOLON Industries Recent Developments/Updates
2.4 SI Group
2.4.1 SI Group Details
2.4.2 SI Group Major Business
2.4.3 SI Group Phenolic Resin for Carbon-Carbon Composite Product and Services
2.4.4 SI Group Phenolic Resin for Carbon-Carbon Composite Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.4.5 SI Group Recent Developments/Updates
2.5 DIC
2.5.1 DIC Details
2.5.2 DIC Major Business
2.5.3 DIC Phenolic Resin for Carbon-Carbon Composite Product and Services
2.5.4 DIC Phenolic Resin for Carbon-Carbon Composite Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.5.5 DIC Recent Developments/Updates
2.6 Jinan Shengquan Group
2.6.1 Jinan Shengquan Group Details
2.6.2 Jinan Shengquan Group Major Business
2.6.3 Jinan Shengquan Group Phenolic Resin for Carbon-Carbon Composite Product and Services
2.6.4 Jinan Shengquan Group Phenolic Resin for Carbon-Carbon Composite Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.6.5 Jinan Shengquan Group Recent Developments/Updates

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2.7 Willing New Materials Technology
2.7.1 Willing New Materials Technology Details
2.7.2 Willing New Materials Technology Major Business
2.7.3 Willing New Materials Technology Phenolic Resin for Carbon-Carbon Composite Product and Services
2.7.4 Willing New Materials Technology Phenolic Resin for Carbon-Carbon Composite Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.7.5 Willing New Materials Technology Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: PHENOLIC RESIN FOR CARBON-CARBON COMPOSITE BY MANUFACTURER

3.1 Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Manufacturer (2021-2026)
3.2 Global Phenolic Resin for Carbon-Carbon Composite Revenue by Manufacturer (2021-2026)
3.3 Global Phenolic Resin for Carbon-Carbon Composite Average Price by Manufacturer (2021-2026)
3.4 Market Share Analysis (2025)
3.4.1 Producer Shipments of Phenolic Resin for Carbon-Carbon Composite by Manufacturer Revenue ($MM) and Market Share (%): 2025
3.4.2 Top 3 Phenolic Resin for Carbon-Carbon Composite Manufacturer Market Share in 2025
3.4.3 Top 6 Phenolic Resin for Carbon-Carbon Composite Manufacturer Market Share in 2025
3.5 Phenolic Resin for Carbon-Carbon Composite Market: Overall Company Footprint Analysis
3.5.1 Phenolic Resin for Carbon-Carbon Composite Market: Region Footprint
3.5.2 Phenolic Resin for Carbon-Carbon Composite Market: Company Product Type Footprint
3.5.3 Phenolic Resin for Carbon-Carbon Composite Market: Company Product Application Footprint
3.6 New Market Entrants and Barriers to Market Entry
3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Phenolic Resin for Carbon-Carbon Composite Market Size by Region
4.1.1 Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Region

+357 96 030922
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(2021-2032)
4.1.2 Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Region (2021-2032)
4.1.3 Global Phenolic Resin for Carbon-Carbon Composite Average Price by Region (2021-2032)
4.2 North America Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032)
4.3 Europe Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032)
4.4 Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032)
4.5 South America Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032)
4.6 Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2032)
5.2 Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Type (2021-2032)
5.3 Global Phenolic Resin for Carbon-Carbon Composite Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2032)
6.2 Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Application (2021-2032)
6.3 Global Phenolic Resin for Carbon-Carbon Composite Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2032)
7.2 North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by

+357 96 030922
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Application (2021-2032)
7.3 North America Phenolic Resin for Carbon-Carbon Composite Market Size by Country
7.3.1 North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2021-2032)
7.3.2 North America Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2021-2032)
7.3.3 United States Market Size and Forecast (2021-2032)
7.3.4 Canada Market Size and Forecast (2021-2032)
7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2032)
8.2 Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2032)
8.3 Europe Phenolic Resin for Carbon-Carbon Composite Market Size by Country
8.3.1 Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2021-2032)
8.3.2 Europe Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2021-2032)
8.3.3 Germany Market Size and Forecast (2021-2032)
8.3.4 France Market Size and Forecast (2021-2032)
8.3.5 United Kingdom Market Size and Forecast (2021-2032)
8.3.6 Russia Market Size and Forecast (2021-2032)
8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2032)
9.2 Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2032)
9.3 Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Market Size by Region
9.3.1 Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Region (2021-2032)
9.3.2 Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Consumption Value by Region (2021-2032)

+357 96 030922
info@marketpublishers.com

9.3.3 China Market Size and Forecast (2021-2032)
9.3.4 Japan Market Size and Forecast (2021-2032)
9.3.5 South Korea Market Size and Forecast (2021-2032)
9.3.6 India Market Size and Forecast (2021-2032)
9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2032)
10.2 South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2032)
10.3 South America Phenolic Resin for Carbon-Carbon Composite Market Size by Country
10.3.1 South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2021-2032)
10.3.2 South America Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2021-2032)
10.3.3 Brazil Market Size and Forecast (2021-2032)
10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2032)
11.2 Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2032)
11.3 Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Market Size by Country
11.3.1 Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2021-2032)
11.3.2 Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2021-2032)
11.3.3 Turkey Market Size and Forecast (2021-2032)
11.3.4 Egypt Market Size and Forecast (2021-2032)
11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
11.3.6 South Africa Market Size and Forecast (2021-2032)

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12 MARKET DYNAMICS

12.1 Phenolic Resin for Carbon-Carbon Composite Market Drivers
12.2 Phenolic Resin for Carbon-Carbon Composite Market Restraints
12.3 Phenolic Resin for Carbon-Carbon Composite Trends Analysis
12.4 Porters Five Forces Analysis
  12.4.1 Threat of New Entrants
  12.4.2 Bargaining Power of Suppliers
  12.4.3 Bargaining Power of Buyers
  12.4.4 Threat of Substitutes
  12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Phenolic Resin for Carbon-Carbon Composite and Key Manufacturers
13.2 Manufacturing Costs Percentage of Phenolic Resin for Carbon-Carbon Composite
13.3 Phenolic Resin for Carbon-Carbon Composite Production Process
13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel
  14.1.1 Direct to End-User
  14.1.2 Distributors
14.2 Phenolic Resin for Carbon-Carbon Composite Typical Distributors
14.3 Phenolic Resin for Carbon-Carbon Composite Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology
16.2 Research Process and Data Source
16.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
Table 2. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Form, (USD Million), 2021 & 2025 & 2032
Table 3. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
Table 4. Sumitomo Bakelite Basic Information, Manufacturing Base and Competitors
Table 5. Sumitomo Bakelite Major Business
Table 6. Sumitomo Bakelite Phenolic Resin for Carbon-Carbon Composite Product and Services
Table 7. Sumitomo Bakelite Phenolic Resin for Carbon-Carbon Composite Sales Quantity (Tons), Average Price (US$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 8. Sumitomo Bakelite Recent Developments/Updates
Table 9. Bakelite Synthetics Basic Information, Manufacturing Base and Competitors
Table 10. Bakelite Synthetics Major Business
Table 11. Bakelite Synthetics Phenolic Resin for Carbon-Carbon Composite Product and Services
Table 12. Bakelite Synthetics Phenolic Resin for Carbon-Carbon Composite Sales Quantity (Tons), Average Price (US$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 13. Bakelite Synthetics Recent Developments/Updates
Table 14. KOLON Industries Basic Information, Manufacturing Base and Competitors
Table 15. KOLON Industries Major Business
Table 16. KOLON Industries Phenolic Resin for Carbon-Carbon Composite Product and Services
Table 17. KOLON Industries Phenolic Resin for Carbon-Carbon Composite Sales Quantity (Tons), Average Price (US$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 18. KOLON Industries Recent Developments/Updates
Table 19. SI Group Basic Information, Manufacturing Base and Competitors
Table 20. SI Group Major Business
Table 21. SI Group Phenolic Resin for Carbon-Carbon Composite Product and Services
Table 22. SI Group Phenolic Resin for Carbon-Carbon Composite Sales Quantity (Tons), Average Price (US$/Ton), Revenue (USD Million), Gross Margin and Market

+357 96 030922
info@marketpublishers.com

Share (2021-2026)
Table 23. SI Group Recent Developments/Updates
Table 24. DIC Basic Information, Manufacturing Base and Competitors
Table 25. DIC Major Business
Table 26. DIC Phenolic Resin for Carbon-Carbon Composite Product and Services
Table 27. DIC Phenolic Resin for Carbon-Carbon Composite Sales Quantity (Tons), Average Price (US$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 28. DIC Recent Developments/Updates
Table 29. Jinan Shengquan Group Basic Information, Manufacturing Base and Competitors
Table 30. Jinan Shengquan Group Major Business
Table 31. Jinan Shengquan Group Phenolic Resin for Carbon-Carbon Composite Product and Services
Table 32. Jinan Shengquan Group Phenolic Resin for Carbon-Carbon Composite Sales Quantity (Tons), Average Price (US$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 33. Jinan Shengquan Group Recent Developments/Updates
Table 34. Willing New Materials Technology Basic Information, Manufacturing Base and Competitors
Table 35. Willing New Materials Technology Major Business
Table 36. Willing New Materials Technology Phenolic Resin for Carbon-Carbon Composite Product and Services
Table 37. Willing New Materials Technology Phenolic Resin for Carbon-Carbon Composite Sales Quantity (Tons), Average Price (US$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 38. Willing New Materials Technology Recent Developments/Updates
Table 39. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Manufacturer (2021-2026) & (Tons)
Table 40. Global Phenolic Resin for Carbon-Carbon Composite Revenue by Manufacturer (2021-2026) & (USD Million)
Table 41. Global Phenolic Resin for Carbon-Carbon Composite Average Price by Manufacturer (2021-2026) & (US$/Ton)
Table 42. Market Position of Manufacturers in Phenolic Resin for Carbon-Carbon Composite, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
Table 43. Head Office and Phenolic Resin for Carbon-Carbon Composite Production Site of Key Manufacturer
Table 44. Phenolic Resin for Carbon-Carbon Composite Market: Company Product Type Footprint

+357 96 030922
info@marketpublishers.com

Table 45. Phenolic Resin for Carbon-Carbon Composite Market: Company Product Application Footprint
Table 46. Phenolic Resin for Carbon-Carbon Composite New Market Entrants and Barriers to Market Entry
Table 47. Phenolic Resin for Carbon-Carbon Composite Mergers, Acquisition, Agreements, and Collaborations
Table 48. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
Table 49. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Region (2021-2026) & (Tons)
Table 50. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Region (2027-2032) & (Tons)
Table 51. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Region (2021-2026) & (USD Million)
Table 52. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Region (2027-2032) & (USD Million)
Table 53. Global Phenolic Resin for Carbon-Carbon Composite Average Price by Region (2021-2026) & (US$/Ton)
Table 54. Global Phenolic Resin for Carbon-Carbon Composite Average Price by Region (2027-2032) & (US$/Ton)
Table 55. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2026) & (Tons)
Table 56. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2027-2032) & (Tons)
Table 57. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Type (2021-2026) & (USD Million)
Table 58. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Type (2027-2032) & (USD Million)
Table 59. Global Phenolic Resin for Carbon-Carbon Composite Average Price by Type (2021-2026) & (US$/Ton)
Table 60. Global Phenolic Resin for Carbon-Carbon Composite Average Price by Type (2027-2032) & (US$/Ton)
Table 61. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2026) & (Tons)
Table 62. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2027-2032) & (Tons)
Table 63. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Application (2021-2026) & (USD Million)
Table 64. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by

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Application (2027-2032) & (USD Million)
Table 65. Global Phenolic Resin for Carbon-Carbon Composite Average Price by Application (2021-2026) & (US$/Ton)
Table 66. Global Phenolic Resin for Carbon-Carbon Composite Average Price by Application (2027-2032) & (US$/Ton)
Table 67. North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2026) & (Tons)
Table 68. North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2027-2032) & (Tons)
Table 69. North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2026) & (Tons)
Table 70. North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2027-2032) & (Tons)
Table 71. North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2021-2026) & (Tons)
Table 72. North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2027-2032) & (Tons)
Table 73. North America Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2021-2026) & (USD Million)
Table 74. North America Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2027-2032) & (USD Million)
Table 75. Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2026) & (Tons)
Table 76. Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2027-2032) & (Tons)
Table 77. Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2026) & (Tons)
Table 78. Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2027-2032) & (Tons)
Table 79. Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2021-2026) & (Tons)
Table 80. Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2027-2032) & (Tons)
Table 81. Europe Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2021-2026) & (USD Million)
Table 82. Europe Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2027-2032) & (USD Million)
Table 83. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2026) & (Tons)

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Table 84. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2027-2032) & (Tons)
Table 85. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2026) & (Tons)
Table 86. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2027-2032) & (Tons)
Table 87. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Region (2021-2026) & (Tons)
Table 88. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Region (2027-2032) & (Tons)
Table 89. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Consumption Value by Region (2021-2026) & (USD Million)
Table 90. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Consumption Value by Region (2027-2032) & (USD Million)
Table 91. South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2026) & (Tons)
Table 92. South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2027-2032) & (Tons)
Table 93. South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2026) & (Tons)
Table 94. South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2027-2032) & (Tons)
Table 95. South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2021-2026) & (Tons)
Table 96. South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2027-2032) & (Tons)
Table 97. South America Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2021-2026) & (USD Million)
Table 98. South America Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2027-2032) & (USD Million)
Table 99. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2021-2026) & (Tons)
Table 100. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Type (2027-2032) & (Tons)
Table 101. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2021-2026) & (Tons)
Table 102. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Application (2027-2032) & (Tons)
Table 103. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales

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Quantity by Country (2021-2026) & (Tons)
Table 104. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity by Country (2027-2032) & (Tons)
Table 105. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2021-2026) & (USD Million)
Table 106. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Consumption Value by Country (2027-2032) & (USD Million)
Table 107. Phenolic Resin for Carbon-Carbon Composite Raw Material
Table 108. Key Manufacturers of Phenolic Resin for Carbon-Carbon Composite Raw Materials
Table 109. Phenolic Resin for Carbon-Carbon Composite Typical Distributors
Table 110. Phenolic Resin for Carbon-Carbon Composite Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. Phenolic Resin for Carbon-Carbon Composite Picture
Figure 2. Global Phenolic Resin for Carbon-Carbon Composite Revenue by Type, (USD Million), 2021 & 2025 & 2032
Figure 3. Global Phenolic Resin for Carbon-Carbon Composite Revenue Market Share by Type in 2025
Figure 4. Resole Phenolic Resin Examples
Figure 5. Novolac Phenolic Resin Examples
Figure 6. Global Phenolic Resin for Carbon-Carbon Composite Revenue by Form, (USD Million), 2021 & 2025 & 2032
Figure 7. Global Phenolic Resin for Carbon-Carbon Composite Revenue Market Share by Form in 2025
Figure 8. Liquid Type Examples
Figure 9. Solid Type Examples
Figure 10. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 11. Global Phenolic Resin for Carbon-Carbon Composite Revenue Market Share by Application in 2025
Figure 12. Aerospace Examples
Figure 13. Transportation Examples
Figure 14. Industrial Equipment Examples
Figure 15. Other Examples
Figure 16. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value, (USD Million): 2021 & 2025 & 2032
Figure 17. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value and Forecast (2021-2032) & (USD Million)
Figure 18. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity (2021-2032) & (Tons)
Figure 19. Global Phenolic Resin for Carbon-Carbon Composite Price (2021-2032) & (US$/Ton)
Figure 20. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Manufacturer in 2025
Figure 21. Global Phenolic Resin for Carbon-Carbon Composite Revenue Market Share by Manufacturer in 2025
Figure 22. Producer Shipments of Phenolic Resin for Carbon-Carbon Composite by Manufacturer Sales ($MM) and Market Share (%): 2025

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Figure 23. Top 3 Phenolic Resin for Carbon-Carbon Composite Manufacturer (Revenue) Market Share in 2025
Figure 24. Top 6 Phenolic Resin for Carbon-Carbon Composite Manufacturer (Revenue) Market Share in 2025
Figure 25. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Region (2021-2032)
Figure 26. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value Market Share by Region (2021-2032)
Figure 27. North America Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 28. Europe Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 29. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 30. South America Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 31. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 32. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Type (2021-2032)
Figure 33. Global Phenolic Resin for Carbon-Carbon Composite Consumption Value Market Share by Type (2021-2032)
Figure 34. Global Phenolic Resin for Carbon-Carbon Composite Average Price by Type (2021-2032) & (US$/Ton)
Figure 35. Global Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Application (2021-2032)
Figure 36. Global Phenolic Resin for Carbon-Carbon Composite Revenue Market Share by Application (2021-2032)
Figure 37. Global Phenolic Resin for Carbon-Carbon Composite Average Price by Application (2021-2032) & (US$/Ton)
Figure 38. North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Type (2021-2032)
Figure 39. North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Application (2021-2032)
Figure 40. North America Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Country (2021-2032)
Figure 41. North America Phenolic Resin for Carbon-Carbon Composite Consumption Value Market Share by Country (2021-2032)
Figure 42. United States Phenolic Resin for Carbon-Carbon Composite Consumption

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Value (2021-2032) & (USD Million)
Figure 43. Canada Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 44. Mexico Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 45. Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Type (2021-2032)
Figure 46. Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Application (2021-2032)
Figure 47. Europe Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Country (2021-2032)
Figure 48. Europe Phenolic Resin for Carbon-Carbon Composite Consumption Value Market Share by Country (2021-2032)
Figure 49. Germany Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 50. France Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 51. United Kingdom Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 52. Russia Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 53. Italy Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 54. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Type (2021-2032)
Figure 55. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Application (2021-2032)
Figure 56. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Region (2021-2032)
Figure 57. Asia-Pacific Phenolic Resin for Carbon-Carbon Composite Consumption Value Market Share by Region (2021-2032)
Figure 58. China Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 59. Japan Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 60. South Korea Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 61. India Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)

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Figure 62. Southeast Asia Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 63. Australia Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 64. South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Type (2021-2032)
Figure 65. South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Application (2021-2032)
Figure 66. South America Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Country (2021-2032)
Figure 67. South America Phenolic Resin for Carbon-Carbon Composite Consumption Value Market Share by Country (2021-2032)
Figure 68. Brazil Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 69. Argentina Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 70. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Type (2021-2032)
Figure 71. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Application (2021-2032)
Figure 72. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Sales Quantity Market Share by Country (2021-2032)
Figure 73. Middle East & Africa Phenolic Resin for Carbon-Carbon Composite Consumption Value Market Share by Country (2021-2032)
Figure 74. Turkey Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 75. Egypt Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 76. Saudi Arabia Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 77. South Africa Phenolic Resin for Carbon-Carbon Composite Consumption Value (2021-2032) & (USD Million)
Figure 78. Phenolic Resin for Carbon-Carbon Composite Market Drivers
Figure 79. Phenolic Resin for Carbon-Carbon Composite Market Restraints
Figure 80. Phenolic Resin for Carbon-Carbon Composite Market Trends
Figure 81. Porters Five Forces Analysis
Figure 82. Manufacturing Cost Structure Analysis of Phenolic Resin for Carbon-Carbon Composite in 2025
Figure 83. Manufacturing Process Analysis of Phenolic Resin for Carbon-Carbon

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Composite
Figure 84. Phenolic Resin for Carbon-Carbon Composite Industrial Chain
Figure 85. Sales Channel: Direct to End-User vs Distributors
Figure 86. Direct Channel Pros & Cons
Figure 87. Indirect Channel Pros & Cons
Figure 88. Methodology
Figure 89. Research Process and Data Source

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