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Global Phenolic Urethane No-Bake Resin Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Phenolic Urethane No-Bake Resin market size is expected to reach $ 315 million by 2032, rising at a market growth of 3.8% CAGR during the forecast period (2026-2032).

Phenolic urethane no-bake (PUNB) resin is an organic binder system used for the production of foundry sand molds and cores that hardens at ambient temperature. Rather than a single resin, it is typically a three-component system comprising a phenolic resin, a polyisocyanate, and a liquid amine catalyst; however, some commercial products are supplied as a two-component system with the catalyst pre-mixed. After mixing with sand, a polyurethane reaction occurs between the hydroxyl groups of the phenolic resin and the isocyanate groups, forming a cross-linked urethane structure that bonds the sand grains together; the mixture hardens spontaneously at room temperature without the need for heating, baking, or the introduction of a curing gas. Primarily used in the production of sand molds and cores for cast iron, cast steel, and non-ferrous alloy castings, this product features adjustable curing speeds, high early strength, good dimensional accuracy, easy shake-out, and sand reclaimability.

Key Findings

Phenolic Urethane No-Bake Resin is primarily supplied as a coordinated three-component ambient-curing binder system

Fast-curing products have stripping times of no more than 10 minutes under the report’s standardized classification

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Iron and steel castings form the principal application base, followed by non-ferrous alloy castings

Balanced and unbalanced systems serve different metering, strength, emissions and collapsibility requirements

Low-VOC, low-odor and lower-addition formulations represent the principal direction of product upgrading

Market Trends

Phenolic Urethane No-Bake Resin is evolving from conventional fast-curing products toward complete binder packages that balance productivity, process tolerance and environmental performance. Product development increasingly focuses on reducing aromatic solvents, VOC emissions, odor, smoke, free phenol and free formaldehyde while maintaining rapid through-curing, tensile strength and erosion resistance. Foundries are also placing greater emphasis on the balance between working time and stripping time. Commercial portfolios are consequently expanding toward long-working-time, hot-sand-compatible, low-temperature-stable, moisture-resistant and specialty-sand grades. Higher resin activity and more uniform curing support lower binder addition, reducing chemical consumption, gas evolution and organic residues in reclaimed sand.

Market Dynamics

Drivers

Demand is supported by foundries seeking shorter mold-production cycles, higher line productivity and more consistent casting quality. Phenolic Urethane No-Bake Resin develops handling and stripping strength rapidly at ambient temperature and allows curing behavior to be adjusted through catalyst selection and dosage. Its suitability for manual molding, semi-automated production and continuous no-bake lines broadens the addressable market. High tensile strength and resistance to molten-metal erosion help maintain mold integrity and reduce sand-related defects, rework and finishing costs. Compatibility with silica sand, reclaimed sand and selected specialty aggregates also supports wider adoption across iron, steel and non-ferrous foundries.

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Restraints

The system depends on phenolic resin, polyisocyanates, organic solvents and amine catalysts, exposing production costs to several chemical feedstocks and increasing storage, handling and occupational-safety requirements. Curing performance is sensitive to sand temperature, moisture, reclaimed-sand quality, ambient humidity, component ratio and dosing accuracy. Excessively rapid curing reduces the effective molding window, while insufficient strength development delays stripping and lowers production efficiency. Conventional solvent-containing systems may also generate odor, VOCs and smoke during mixing, pouring, cooling and shakeout, increasing ventilation, environmental-compliance and formulation-development costs.

Opportunities

The most attractive opportunities lie in low-VOC, low-odor, low-aromatic and low-free-phenol or formaldehyde systems that improve workplace conditions without requiring major changes to existing no-bake equipment. Higher-activity formulations that achieve required strength at lower binder addition can reduce material consumption, gas evolution and residual organics in reclaimed sand. Long-working-time grades offer potential in large and complex steel molds, while moisture-resistant, hot-sand and low-temperature products address production variability across different climates and reclamation conditions. Specialty formulations for ceramic sand, chromite sand and non-ferrous alloys provide additional opportunities in higher-value casting applications.

Challenges

The principal challenge is balancing working time, stripping time, early strength, final strength, collapsibility, emissions and reclaimed-sand performance within one coordinated system. A formulation proven with new silica sand may perform differently with reclaimed sand or specialty aggregates, requiring customer-specific trials and catalyst adjustment. The market also faces competition from furan no-bake resin, ester-cured alkaline phenolic resin, alkyd urethane resin and inorganic binder systems. Manufacturers must therefore maintain consistent quality across all coordinated components while providing reliable local supply and rapid technical support.

Industry Chain Analysis

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The upstream industry includes phenol, formaldehyde and modifiers for benzyl ether phenolic resin production, MDI-based polyisocyanates, organic solvents, tertiary-amine catalysts and functional additives. Resin composition determines viscosity, sand wetting, reactivity and storage stability; the polyisocyanate component controls urethane crosslinking and strength development; and the catalyst regulates working and stripping time. The midstream segment covers resin synthesis, isocyanate formulation, catalyst production, blending, quality control, packaging and application engineering. Downstream customers are foundries serving automotive, machinery, pumps and valves, energy equipment, mining equipment and general engineering. Value creation depends on stable curing, lower binder addition, defect reduction, technical service and lower total cost per acceptable casting.

Segment Insights

Under the report's standardized stripping-time classification, fast-curing products have stripping times of no more than 10 minutes, standard-curing products range from more than 10 to 30 minutes, and slow-curing products exceed 30 minutes. Fast-curing grades are mainly used in repetitive molding and automated lines, standard-curing products serve the broadest range of conventional foundry operations, and slow-curing grades provide longer filling, compaction and assembly windows for large or complex molds. Actual performance must be compared under consistent sand type, sand temperature, binder addition, component ratio and catalyst dosage.

By resin component ratio, the market is divided into balanced and unbalanced systems. Balanced systems generally use similar addition levels for the phenolic resin and polyisocyanate components, simplifying metering and process control. Unbalanced systems use different component proportions to optimize strength development, emissions, collapsibility, cost or compatibility with specific sands and alloys. Both require matched catalyst packages and are evaluated as complete binder systems rather than independent chemical components.

Downstream Market Opportunities

Iron castings provide the broadest recurring demand for Phenolic Urethane No-Bake Resin, particularly in machinery, automotive components, pumps, valves and general engineering products. Steel foundries represent an important value-oriented segment because medium and large castings require high mold strength, erosion resistance, dimensional stability and sufficient assembly time. Non-ferrous alloy foundries place

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greater emphasis on rapid curing, surface quality, low odor and easy shakeout, creating opportunities for dedicated aluminium and copper-alloy grades. Across all applications, demand is moving toward systems that maintain strength at lower binder addition and improve reclaimed-sand economics.

Regional Insights

Asia represents the principal volume market, supported by its extensive iron, steel and non-ferrous casting production base. China combines large downstream demand with established domestic resin manufacturing and a market ranging from cost-oriented general grades to low-emission and specialty-sand products. Japan emphasizes process consistency and high casting quality, while India continues to expand its domestic and export-oriented foundry supply chain. North America is a mature market with strong demand for predictable process control, technical service and lower-emission formulations. Europe is more strongly influenced by environmental compliance, energy costs and productivity improvement, while Türkiye serves as an important regional production and export base.

Competitive Landscape Analysis

The Phenolic Urethane No-Bake Resin market combines multinational foundry-chemical groups with national and regional specialists. ASK Chemicals, HA Group and Vesuvius compete through broad no-bake portfolios, international supply capability and technical-service networks. ASAHI YUKIZAI maintains an established position in quality-sensitive Asian applications, while Mancuso Chemicals, Çukurova Kimya, Forace Polymers and IVP Limited emphasize regional manufacturing and specialized formulations. In China, Shengquan Group and Suzhou Xingye Materials Technology benefit from broader foundry-material portfolios, whereas Liaoning Xinda Casting Technology and Changle Hengchang Chemical compete through localized supply, curing-time adjustment and customized technical service.

Report Scope

This report studies the global Phenolic Urethane No-Bake Resin production, demand, key manufacturers, and key regions.

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This report is a detailed and comprehensive analysis of the world market for Phenolic Urethane No-Bake 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 Phenolic Urethane No-Bake Resin that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Phenolic Urethane No-Bake Resin total production and demand, 2021-2032, (Tons)

Global Phenolic Urethane No-Bake Resin total production value, 2021-2032, (USD Million)

Global Phenolic Urethane No-Bake Resin production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Phenolic Urethane No-Bake Resin consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Phenolic Urethane No-Bake Resin domestic production, consumption, key domestic manufacturers and share

Global Phenolic Urethane No-Bake Resin production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Phenolic Urethane No-Bake Resin production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Phenolic Urethane No-Bake Resin production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Phenolic Urethane No-Bake 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 ASK Chemicals, HA Group,

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Vesuvius, ASAHI YUKIZAI, Forace Polymers, Mancuso Chemicals, IVP Limited, Çukurova Kimya, Shengquan Group, Suzhou Xingye 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 Urethane No-Bake Resin 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 year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Phenolic Urethane No-Bake Resin Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

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Global Phenolic Urethane No-Bake Resin Market, Segmentation by Type:

Fast-curing Type (?10 min)

Standard-curing Type (>10–30 min)

Slow-curing Type (>30 min)

Global Phenolic Urethane No-Bake Resin Market, Segmentation by Resin Component Ratio:

Balanced Type

Unbalanced Type

Global Phenolic Urethane No-Bake Resin Market, Segmentation by Application:

Steel Castings

Iron Castings

Non-ferrous Alloy Castings

Companies Profiled:

ASK Chemicals

HA Group

Vesuvius

ASAHI YUKIZAI

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Forace Polymers

Mancuso Chemicals

IVP Limited

Çukurova Kimya

Shengquan Group

Suzhou Xingye Materials Technology

Liaoning Xinda Casting Technology

Changle Hengchang Chemical

Key Questions Answered

1. How big is the global Phenolic Urethane No-Bake Resin market?
2. What is the demand of the global Phenolic Urethane No-Bake Resin market?
3. What is the year over year growth of the global Phenolic Urethane No-Bake Resin market?
4. What is the total value of the global Phenolic Urethane No-Bake Resin market?
5. Who are the Major Players in the global Phenolic Urethane No-Bake Resin market?
6. What are the growth factors driving the market demand?

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