

Global Phenolic Cotton Sheet Market Growth 2026-2032

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Abstracts

The global Phenolic Cotton Sheet market size is predicted to grow from US\$ 110 million in 2025 to US\$ 138 million in 2032; it is expected to grow at a CAGR of 3.3% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the 'Phenolic Cotton Sheet Industry

Forecast? looks at past sales and reviews total world Phenolic Cotton Sheet sales in 2025, providing a comprehensive analysis by region and market sector of projected Phenolic Cotton Sheet sales for 2026 through 2032. With Phenolic Cotton Sheet sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Phenolic Cotton Sheet industry.

This Insight Report provides a comprehensive analysis of the global Phenolic Cotton Sheet landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Phenolic Cotton Sheet portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Phenolic Cotton Sheet market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Phenolic Cotton Sheet and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Phenolic Cotton Sheet.

This report presents a comprehensive overview, market shares, and growth opportunities of Phenolic Cotton Sheet market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Coarse Weave Cotton Fabric

Medium Weave Cotton Fabric

Fine Weave Cotton Fabric

Segmentation by Friend Group Benchmark Grade:

F850 / PFCC201 Equivalent

F852 / PFCC202 Equivalent

F851 / PFCC203 Equivalent

Others

Segmentation by Form:

Thick Plates

Thin Sheets

Segmentation by Application:

Industrial Machinery

Electrical Equipment

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Phenolic Cotton Sheet market?

What factors are driving Phenolic Cotton Sheet market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Phenolic Cotton Sheet market opportunities vary by end market size?

How does Phenolic Cotton Sheet break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Phenolic Cotton Sheet Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Phenolic Cotton Sheet by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Phenolic Cotton Sheet by Country/Region, 2021, 2025 & 2032
- 2.2 Phenolic Cotton Sheet Segment by Type
 - 2.2.1 Coarse Weave Cotton Fabric
 - 2.2.2 Medium Weave Cotton Fabric
 - 2.2.3 Fine Weave Cotton Fabric
 - 2.2.4 Phenolic Cotton Sheet Sales by Type
 - 2.2.4.1 Global Phenolic Cotton Sheet Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Phenolic Cotton Sheet Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Phenolic Cotton Sheet Sale Price by Type (2021-2026)
- 2.3 Phenolic Cotton Sheet Segment by Friend Group Benchmark Grade
 - 2.3.1 F850 / PFCC201 Equivalent
 - 2.3.2 F852 / PFCC202 Equivalent
 - 2.3.3 F851 / PFCC203 Equivalent
 - 2.3.4 Others
 - 2.3.5 Phenolic Cotton Sheet Sales by Friend Group Benchmark Grade
 - 2.3.5.1 Global Phenolic Cotton Sheet Sales Market Share by Friend Group Benchmark Grade (2021-2026)
 - 2.3.5.2 Global Phenolic Cotton Sheet Revenue and Market Share by Friend Group

Benchmark Grade (2021-2026)

2.3.5.3 Global Phenolic Cotton Sheet Sale Price by Friend Group Benchmark Grade (2021-2026)

2.4 Phenolic Cotton Sheet Segment by Form

2.4.1 Thick Plates

2.4.2 Thin Sheets

2.4.3 Phenolic Cotton Sheet Sales by Form

2.4.3.1 Global Phenolic Cotton Sheet Sales Market Share by Form (2021-2026)

2.4.3.2 Global Phenolic Cotton Sheet Revenue and Market Share by Form (2021-2026)

2.4.3.3 Global Phenolic Cotton Sheet Sale Price by Form (2021-2026)

2.5 Phenolic Cotton Sheet Segment by Application

2.5.1 Industrial Machinery

2.5.2 Electrical Equipment

2.5.3 Others

2.5.4 Phenolic Cotton Sheet Sales by Application

2.5.4.1 Global Phenolic Cotton Sheet Sale Market Share by Application (2021-2026)

2.5.4.2 Global Phenolic Cotton Sheet Revenue and Market Share by Application (2021-2026)

2.5.4.3 Global Phenolic Cotton Sheet Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Phenolic Cotton Sheet Breakdown Data by Company

3.1.1 Global Phenolic Cotton Sheet Annual Sales by Company (2021-2026)

3.1.2 Global Phenolic Cotton Sheet Sales Market Share by Company (2021-2026)

3.2 Global Phenolic Cotton Sheet Annual Revenue by Company (2021-2026)

3.2.1 Global Phenolic Cotton Sheet Revenue by Company (2021-2026)

3.2.2 Global Phenolic Cotton Sheet Revenue Market Share by Company (2021-2026)

3.3 Global Phenolic Cotton Sheet Sale Price by Company

3.4 Key Manufacturers Phenolic Cotton Sheet Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Phenolic Cotton Sheet Product Location Distribution

3.4.2 Players Phenolic Cotton Sheet Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR PHENOLIC COTTON SHEET BY GEOGRAPHIC REGION

4.1 World Historic Phenolic Cotton Sheet Market Size by Geographic Region (2021-2026)

4.1.1 Global Phenolic Cotton Sheet Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Phenolic Cotton Sheet Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Phenolic Cotton Sheet Market Size by Country/Region (2021-2026)

4.2.1 Global Phenolic Cotton Sheet Annual Sales by Country/Region (2021-2026)

4.2.2 Global Phenolic Cotton Sheet Annual Revenue by Country/Region (2021-2026)

4.3 Americas Phenolic Cotton Sheet Sales Growth

4.4 APAC Phenolic Cotton Sheet Sales Growth

4.5 Europe Phenolic Cotton Sheet Sales Growth

4.6 Middle East & Africa Phenolic Cotton Sheet Sales Growth

5 AMERICAS

5.1 Americas Phenolic Cotton Sheet Sales by Country

5.1.1 Americas Phenolic Cotton Sheet Sales by Country (2021-2026)

5.1.2 Americas Phenolic Cotton Sheet Revenue by Country (2021-2026)

5.2 Americas Phenolic Cotton Sheet Sales by Type (2021-2026)

5.3 Americas Phenolic Cotton Sheet Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Phenolic Cotton Sheet Sales by Region

6.1.1 APAC Phenolic Cotton Sheet Sales by Region (2021-2026)

6.1.2 APAC Phenolic Cotton Sheet Revenue by Region (2021-2026)

6.2 APAC Phenolic Cotton Sheet Sales by Type (2021-2026)

6.3 APAC Phenolic Cotton Sheet Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Phenolic Cotton Sheet by Country

7.1.1 Europe Phenolic Cotton Sheet Sales by Country (2021-2026)

7.1.2 Europe Phenolic Cotton Sheet Revenue by Country (2021-2026)

7.2 Europe Phenolic Cotton Sheet Sales by Type (2021-2026)

7.3 Europe Phenolic Cotton Sheet Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Phenolic Cotton Sheet by Country

8.1.1 Middle East & Africa Phenolic Cotton Sheet Sales by Country (2021-2026)

8.1.2 Middle East & Africa Phenolic Cotton Sheet Revenue by Country (2021-2026)

8.2 Middle East & Africa Phenolic Cotton Sheet Sales by Type (2021-2026)

8.3 Middle East & Africa Phenolic Cotton Sheet Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

- 10.1 Raw Material and Suppliers
- 10.2 Manufacturing Cost Structure Analysis of Phenolic Cotton Sheet
- 10.3 Manufacturing Process Analysis of Phenolic Cotton Sheet
- 10.4 Industry Chain Structure of Phenolic Cotton Sheet

11 MARKETING, DISTRIBUTORS AND CUSTOMER

- 11.1 Sales Channel
 - 11.1.1 Direct Channels
 - 11.1.2 Indirect Channels
- 11.2 Phenolic Cotton Sheet Distributors
- 11.3 Phenolic Cotton Sheet Customer

12 WORLD FORECAST REVIEW FOR PHENOLIC COTTON SHEET BY GEOGRAPHIC REGION

- 12.1 Global Phenolic Cotton Sheet Market Size Forecast by Region
 - 12.1.1 Global Phenolic Cotton Sheet Forecast by Region (2027-2032)
 - 12.1.2 Global Phenolic Cotton Sheet Annual Revenue Forecast by Region (2027-2032)
- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Phenolic Cotton Sheet Forecast by Type (2027-2032)
- 12.7 Global Phenolic Cotton Sheet Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

- 13.1 Norplex-Micarta
 - 13.1.1 Norplex-Micarta Company Information
 - 13.1.2 Norplex-Micarta Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.1.3 Norplex-Micarta Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.1.4 Norplex-Micarta Main Business Overview
 - 13.1.5 Norplex-Micarta Latest Developments
- 13.2 Beijing Friend Group
 - 13.2.1 Beijing Friend Group Company Information
 - 13.2.2 Beijing Friend Group Phenolic Cotton Sheet Product Portfolios and

Specifications

13.2.3 Beijing Friend Group Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Beijing Friend Group Main Business Overview

13.2.5 Beijing Friend Group Latest Developments

13.3 Tufnol Composites

13.3.1 Tufnol Composites Company Information

13.3.2 Tufnol Composites Phenolic Cotton Sheet Product Portfolios and Specifications

13.3.3 Tufnol Composites Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Tufnol Composites Main Business Overview

13.3.5 Tufnol Composites Latest Developments

13.4 ISOVOLTA AG

13.4.1 ISOVOLTA AG Company Information

13.4.2 ISOVOLTA AG Phenolic Cotton Sheet Product Portfolios and Specifications

13.4.3 ISOVOLTA AG Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 ISOVOLTA AG Main Business Overview

13.4.5 ISOVOLTA AG Latest Developments

13.5 Von Roll

13.5.1 Von Roll Company Information

13.5.2 Von Roll Phenolic Cotton Sheet Product Portfolios and Specifications

13.5.3 Von Roll Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Von Roll Main Business Overview

13.5.5 Von Roll Latest Developments

13.6 ITEN Industries

13.6.1 ITEN Industries Company Information

13.6.2 ITEN Industries Phenolic Cotton Sheet Product Portfolios and Specifications

13.6.3 ITEN Industries Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 ITEN Industries Main Business Overview

13.6.5 ITEN Industries Latest Developments

13.7 Attwater Group

13.7.1 Attwater Group Company Information

13.7.2 Attwater Group Phenolic Cotton Sheet Product Portfolios and Specifications

13.7.3 Attwater Group Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Attwater Group Main Business Overview

- 13.7.5 Attwater Group Latest Developments
- 13.8 Accurate Plastics / Acculam
 - 13.8.1 Accurate Plastics / Acculam Company Information
 - 13.8.2 Accurate Plastics / Acculam Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.8.3 Accurate Plastics / Acculam Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Accurate Plastics / Acculam Main Business Overview
 - 13.8.5 Accurate Plastics / Acculam Latest Developments
- 13.9 Spaulding Composites
 - 13.9.1 Spaulding Composites Company Information
 - 13.9.2 Spaulding Composites Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.9.3 Spaulding Composites Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Spaulding Composites Main Business Overview
 - 13.9.5 Spaulding Composites Latest Developments
- 13.10 Franklin Fibre-Lamitex
 - 13.10.1 Franklin Fibre-Lamitex Company Information
 - 13.10.2 Franklin Fibre-Lamitex Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.10.3 Franklin Fibre-Lamitex Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Franklin Fibre-Lamitex Main Business Overview
 - 13.10.5 Franklin Fibre-Lamitex Latest Developments
- 13.11 Futamura Chemical
 - 13.11.1 Futamura Chemical Company Information
 - 13.11.2 Futamura Chemical Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.11.3 Futamura Chemical Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Futamura Chemical Main Business Overview
 - 13.11.5 Futamura Chemical Latest Developments
- 13.12 Risho Kogyo
 - 13.12.1 Risho Kogyo Company Information
 - 13.12.2 Risho Kogyo Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.12.3 Risho Kogyo Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Risho Kogyo Main Business Overview

- 13.12.5 Risho Kogyo Latest Developments
- 13.13 Qingdao Tainuo
 - 13.13.1 Qingdao Tainuo Company Information
 - 13.13.2 Qingdao Tainuo Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.13.3 Qingdao Tainuo Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 Qingdao Tainuo Main Business Overview
 - 13.13.5 Qingdao Tainuo Latest Developments
- 13.14 SHANDONG AOXING
 - 13.14.1 SHANDONG AOXING Company Information
 - 13.14.2 SHANDONG AOXING Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.14.3 SHANDONG AOXING Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 SHANDONG AOXING Main Business Overview
 - 13.14.5 SHANDONG AOXING Latest Developments
- 13.15 Xuchang Jingwei
 - 13.15.1 Xuchang Jingwei Company Information
 - 13.15.2 Xuchang Jingwei Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.15.3 Xuchang Jingwei Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.15.4 Xuchang Jingwei Main Business Overview
 - 13.15.5 Xuchang Jingwei Latest Developments
- 13.16 Beijing Red Sun Technology / RDS
 - 13.16.1 Beijing Red Sun Technology / RDS Company Information
 - 13.16.2 Beijing Red Sun Technology / RDS Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.16.3 Beijing Red Sun Technology / RDS Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.16.4 Beijing Red Sun Technology / RDS Main Business Overview
 - 13.16.5 Beijing Red Sun Technology / RDS Latest Developments
- 13.17 Hon Tai Material
 - 13.17.1 Hon Tai Material Company Information
 - 13.17.2 Hon Tai Material Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.17.3 Hon Tai Material Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.17.4 Hon Tai Material Main Business Overview
 - 13.17.5 Hon Tai Material Latest Developments
- 13.18 Jiangyin Hucheng Insulation Materials

- 13.18.1 Jiangyin Hucheng Insulation Materials Company Information
- 13.18.2 Jiangyin Hucheng Insulation Materials Phenolic Cotton Sheet Product Portfolios and Specifications
- 13.18.3 Jiangyin Hucheng Insulation Materials Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.18.4 Jiangyin Hucheng Insulation Materials Main Business Overview
- 13.18.5 Jiangyin Hucheng Insulation Materials Latest Developments
- 13.19 Lamtuf
 - 13.19.1 Lamtuf Company Information
 - 13.19.2 Lamtuf Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.19.3 Lamtuf Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 Lamtuf Main Business Overview
 - 13.19.5 Lamtuf Latest Developments
- 13.20 Yangzhou Tuoteng
 - 13.20.1 Yangzhou Tuoteng Company Information
 - 13.20.2 Yangzhou Tuoteng Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.20.3 Yangzhou Tuoteng Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 Yangzhou Tuoteng Main Business Overview
 - 13.20.5 Yangzhou Tuoteng Latest Developments
- 13.21 Henan Jinzhi
 - 13.21.1 Henan Jinzhi Company Information
 - 13.21.2 Henan Jinzhi Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.21.3 Henan Jinzhi Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.21.4 Henan Jinzhi Main Business Overview
 - 13.21.5 Henan Jinzhi Latest Developments
- 13.22 Hangzhou Liansheng
 - 13.22.1 Hangzhou Liansheng Company Information
 - 13.22.2 Hangzhou Liansheng Phenolic Cotton Sheet Product Portfolios and Specifications
 - 13.22.3 Hangzhou Liansheng Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.22.4 Hangzhou Liansheng Main Business Overview
 - 13.22.5 Hangzhou Liansheng Latest Developments
- 13.23 Shenzhen Zhongke Hengrun
 - 13.23.1 Shenzhen Zhongke Hengrun Company Information

13.23.2 Shenzhen Zhongke Hengrun Phenolic Cotton Sheet Product Portfolios and Specifications

13.23.3 Shenzhen Zhongke Hengrun Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 Shenzhen Zhongke Hengrun Main Business Overview

13.23.5 Shenzhen Zhongke Hengrun Latest Developments

13.24 Hebei Jinghong Electronic

13.24.1 Hebei Jinghong Electronic Company Information

13.24.2 Hebei Jinghong Electronic Phenolic Cotton Sheet Product Portfolios and Specifications

13.24.3 Hebei Jinghong Electronic Phenolic Cotton Sheet Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 Hebei Jinghong Electronic Main Business Overview

13.24.5 Hebei Jinghong Electronic Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Phenolic Cotton Sheet Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Phenolic Cotton Sheet Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Coarse Weave Cotton Fabric

Table 4. Major Players of Medium Weave Cotton Fabric

Table 5. Major Players of Fine Weave Cotton Fabric

Table 6. Global Phenolic Cotton Sheet Sales by Type (2021-2026) & (Kilotons)

Table 7. Global Phenolic Cotton Sheet Sales Market Share by Type (2021-2026)

Table 8. Global Phenolic Cotton Sheet Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Phenolic Cotton Sheet Revenue Market Share by Type (2021-2026)

Table 10. Global Phenolic Cotton Sheet Sale Price by Type (2021-2026) & (US\$/Ton)

Table 11. Major Players of F850 / PFCC201 Equivalent

Table 12. Major Players of F852 / PFCC202 Equivalent

Table 13. Major Players of F851 / PFCC203 Equivalent

Table 14. Major Players of Others

Table 15. Global Phenolic Cotton Sheet Sales by Friend Group Benchmark Grade (2021-2026) & (Kilotons)

Table 16. Global Phenolic Cotton Sheet Sales Market Share by Friend Group Benchmark Grade (2021-2026)

Table 17. Global Phenolic Cotton Sheet Revenue by Friend Group Benchmark Grade (2021-2026) & (\$ million)

Table 18. Global Phenolic Cotton Sheet Revenue Market Share by Friend Group Benchmark Grade (2021-2026)

Table 19. Global Phenolic Cotton Sheet Sale Price by Friend Group Benchmark Grade (2021-2026) & (US\$/Ton)

Table 20. Major Players of Thick Plates

Table 21. Major Players of Thin Sheets

Table 22. Global Phenolic Cotton Sheet Sales by Form (2021-2026) & (Kilotons)

Table 23. Global Phenolic Cotton Sheet Sales Market Share by Form (2021-2026)

Table 24. Global Phenolic Cotton Sheet Revenue by Form (2021-2026) & (\$ million)

Table 25. Global Phenolic Cotton Sheet Revenue Market Share by Form (2021-2026)

Table 26. Global Phenolic Cotton Sheet Sale Price by Form (2021-2026) & (US\$/Ton)

Table 27. Global Phenolic Cotton Sheet Sale by Application (2021-2026) & (Kilotons)

Table 28. Global Phenolic Cotton Sheet Sale Market Share by Application (2021-2026)

Table 29. Global Phenolic Cotton Sheet Revenue by Application (2021-2026) & (\$ million)

Table 30. Global Phenolic Cotton Sheet Revenue Market Share by Application (2021-2026)

Table 31. Global Phenolic Cotton Sheet Sale Price by Application (2021-2026) & (US\$/Ton)

Table 32. Global Phenolic Cotton Sheet Sales by Company (2021-2026) & (Kilotons)

Table 33. Global Phenolic Cotton Sheet Sales Market Share by Company (2021-2026)

Table 34. Global Phenolic Cotton Sheet Revenue by Company (2021-2026) & (\$ millions)

Table 35. Global Phenolic Cotton Sheet Revenue Market Share by Company (2021-2026)

Table 36. Global Phenolic Cotton Sheet Sale Price by Company (2021-2026) & (US\$/Ton)

Table 37. Key Manufacturers Phenolic Cotton Sheet Producing Area Distribution and Sales Area

Table 38. Players Phenolic Cotton Sheet Products Offered

Table 39. Phenolic Cotton Sheet Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 40. New Products and Potential Entrants

Table 41. Market M&A Activity & Strategy

Table 42. Global Phenolic Cotton Sheet Sales by Geographic Region (2021-2026) & (Kilotons)

Table 43. Global Phenolic Cotton Sheet Sales Market Share Geographic Region (2021-2026)

Table 44. Global Phenolic Cotton Sheet Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 45. Global Phenolic Cotton Sheet Revenue Market Share by Geographic Region (2021-2026)

Table 46. Global Phenolic Cotton Sheet Sales by Country/Region (2021-2026) & (Kilotons)

Table 47. Global Phenolic Cotton Sheet Sales Market Share by Country/Region (2021-2026)

Table 48. Global Phenolic Cotton Sheet Revenue by Country/Region (2021-2026) & (\$ millions)

Table 49. Global Phenolic Cotton Sheet Revenue Market Share by Country/Region (2021-2026)

Table 50. Americas Phenolic Cotton Sheet Sales by Country (2021-2026) & (Kilotons)

Table 51. Americas Phenolic Cotton Sheet Sales Market Share by Country (2021-2026)

Table 52. Americas Phenolic Cotton Sheet Revenue by Country (2021-2026) & (\$ millions)

Table 53. Americas Phenolic Cotton Sheet Sales by Type (2021-2026) & (Kilotons)

Table 54. Americas Phenolic Cotton Sheet Sales by Application (2021-2026) & (Kilotons)

Table 55. APAC Phenolic Cotton Sheet Sales by Region (2021-2026) & (Kilotons)

Table 56. APAC Phenolic Cotton Sheet Sales Market Share by Region (2021-2026)

Table 57. APAC Phenolic Cotton Sheet Revenue by Region (2021-2026) & (\$ millions)

Table 58. APAC Phenolic Cotton Sheet Sales by Type (2021-2026) & (Kilotons)

Table 59. APAC Phenolic Cotton Sheet Sales by Application (2021-2026) & (Kilotons)

Table 60. Europe Phenolic Cotton Sheet Sales by Country (2021-2026) & (Kilotons)

Table 61. Europe Phenolic Cotton Sheet Revenue by Country (2021-2026) & (\$ millions)

Table 62. Europe Phenolic Cotton Sheet Sales by Type (2021-2026) & (Kilotons)

Table 63. Europe Phenolic Cotton Sheet Sales by Application (2021-2026) & (Kilotons)

Table 64. Middle East & Africa Phenolic Cotton Sheet Sales by Country (2021-2026) & (Kilotons)

Table 65. Middle East & Africa Phenolic Cotton Sheet Revenue Market Share by Country (2021-2026)

Table 66. Middle East & Africa Phenolic Cotton Sheet Sales by Type (2021-2026) & (Kilotons)

Table 67. Middle East & Africa Phenolic Cotton Sheet Sales by Application (2021-2026) & (Kilotons)

Table 68. Key Market Drivers & Growth Opportunities of Phenolic Cotton Sheet

Table 69. Key Market Challenges & Risks of Phenolic Cotton Sheet

Table 70. Key Industry Trends of Phenolic Cotton Sheet

Table 71. Phenolic Cotton Sheet Raw Material

Table 72. Key Suppliers of Raw Materials

Table 73. Phenolic Cotton Sheet Distributors List

Table 74. Phenolic Cotton Sheet Customer List

Table 75. Global Phenolic Cotton Sheet Sales Forecast by Region (2027-2032) & (Kilotons)

Table 76. Global Phenolic Cotton Sheet Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 77. Americas Phenolic Cotton Sheet Sales Forecast by Country (2027-2032) & (Kilotons)

Table 78. Americas Phenolic Cotton Sheet Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 79. APAC Phenolic Cotton Sheet Sales Forecast by Region (2027-2032) &

(Kilotons)

Table 80. APAC Phenolic Cotton Sheet Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Europe Phenolic Cotton Sheet Sales Forecast by Country (2027-2032) & (Kilotons)

Table 82. Europe Phenolic Cotton Sheet Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Middle East & Africa Phenolic Cotton Sheet Sales Forecast by Country (2027-2032) & (Kilotons)

Table 84. Middle East & Africa Phenolic Cotton Sheet Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Global Phenolic Cotton Sheet Sales Forecast by Type (2027-2032) & (Kilotons)

Table 86. Global Phenolic Cotton Sheet Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 87. Global Phenolic Cotton Sheet Sales Forecast by Application (2027-2032) & (Kilotons)

Table 88. Global Phenolic Cotton Sheet Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 89. Norplex-Micarta Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 90. Norplex-Micarta Phenolic Cotton Sheet Product Portfolios and Specifications

Table 91. Norplex-Micarta Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 92. Norplex-Micarta Main Business

Table 93. Norplex-Micarta Latest Developments

Table 94. Beijing Friend Group Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 95. Beijing Friend Group Phenolic Cotton Sheet Product Portfolios and Specifications

Table 96. Beijing Friend Group Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 97. Beijing Friend Group Main Business

Table 98. Beijing Friend Group Latest Developments

Table 99. Tufnol Composites Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 100. Tufnol Composites Phenolic Cotton Sheet Product Portfolios and Specifications

Table 101. Tufnol Composites Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$

Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 102. Tufnol Composites Main Business

Table 103. Tufnol Composites Latest Developments

Table 104. ISOVOLTA AG Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 105. ISOVOLTA AG Phenolic Cotton Sheet Product Portfolios and Specifications

Table 106. ISOVOLTA AG Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 107. ISOVOLTA AG Main Business

Table 108. ISOVOLTA AG Latest Developments

Table 109. Von Roll Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 110. Von Roll Phenolic Cotton Sheet Product Portfolios and Specifications

Table 111. Von Roll Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 112. Von Roll Main Business

Table 113. Von Roll Latest Developments

Table 114. ITEN Industries Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 115. ITEN Industries Phenolic Cotton Sheet Product Portfolios and Specifications

Table 116. ITEN Industries Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 117. ITEN Industries Main Business

Table 118. ITEN Industries Latest Developments

Table 119. Attwater Group Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 120. Attwater Group Phenolic Cotton Sheet Product Portfolios and Specifications

Table 121. Attwater Group Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 122. Attwater Group Main Business

Table 123. Attwater Group Latest Developments

Table 124. Accurate Plastics / Acculam Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 125. Accurate Plastics / Acculam Phenolic Cotton Sheet Product Portfolios and Specifications

Table 126. Accurate Plastics / Acculam Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 127. Accurate Plastics / Acculam Main Business

Table 128. Accurate Plastics / Acculam Latest Developments

Table 129. Spaulding Composites Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors
Table 130. Spaulding Composites Phenolic Cotton Sheet Product Portfolios and Specifications
Table 131. Spaulding Composites Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 132. Spaulding Composites Main Business
Table 133. Spaulding Composites Latest Developments
Table 134. Franklin Fibre-Lamitex Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors
Table 135. Franklin Fibre-Lamitex Phenolic Cotton Sheet Product Portfolios and Specifications
Table 136. Franklin Fibre-Lamitex Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 137. Franklin Fibre-Lamitex Main Business
Table 138. Franklin Fibre-Lamitex Latest Developments
Table 139. Futamura Chemical Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors
Table 140. Futamura Chemical Phenolic Cotton Sheet Product Portfolios and Specifications
Table 141. Futamura Chemical Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 142. Futamura Chemical Main Business
Table 143. Futamura Chemical Latest Developments
Table 144. Risho Kogyo Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors
Table 145. Risho Kogyo Phenolic Cotton Sheet Product Portfolios and Specifications
Table 146. Risho Kogyo Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 147. Risho Kogyo Main Business
Table 148. Risho Kogyo Latest Developments
Table 149. Qingdao Tainuo Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors
Table 150. Qingdao Tainuo Phenolic Cotton Sheet Product Portfolios and Specifications
Table 151. Qingdao Tainuo Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 152. Qingdao Tainuo Main Business
Table 153. Qingdao Tainuo Latest Developments
Table 154. SHANDONG AOXING Basic Information, Phenolic Cotton Sheet

Manufacturing Base, Sales Area and Its Competitors

Table 155. SHANDONG AOXING Phenolic Cotton Sheet Product Portfolios and Specifications

Table 156. SHANDONG AOXING Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 157. SHANDONG AOXING Main Business

Table 158. SHANDONG AOXING Latest Developments

Table 159. Xuchang Jingwei Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 160. Xuchang Jingwei Phenolic Cotton Sheet Product Portfolios and Specifications

Table 161. Xuchang Jingwei Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 162. Xuchang Jingwei Main Business

Table 163. Xuchang Jingwei Latest Developments

Table 164. Beijing Red Sun Technology / RDS Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 165. Beijing Red Sun Technology / RDS Phenolic Cotton Sheet Product Portfolios and Specifications

Table 166. Beijing Red Sun Technology / RDS Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 167. Beijing Red Sun Technology / RDS Main Business

Table 168. Beijing Red Sun Technology / RDS Latest Developments

Table 169. Hon Tai Material Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 170. Hon Tai Material Phenolic Cotton Sheet Product Portfolios and Specifications

Table 171. Hon Tai Material Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 172. Hon Tai Material Main Business

Table 173. Hon Tai Material Latest Developments

Table 174. Jiangyin Hucheng Insulation Materials Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 175. Jiangyin Hucheng Insulation Materials Phenolic Cotton Sheet Product Portfolios and Specifications

Table 176. Jiangyin Hucheng Insulation Materials Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 177. Jiangyin Hucheng Insulation Materials Main Business

Table 178. Jiangyin Hucheng Insulation Materials Latest Developments

Table 179. Lamtuf Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 180. Lamtuf Phenolic Cotton Sheet Product Portfolios and Specifications

Table 181. Lamtuf Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 182. Lamtuf Main Business

Table 183. Lamtuf Latest Developments

Table 184. Yangzhou Tuoteng Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 185. Yangzhou Tuoteng Phenolic Cotton Sheet Product Portfolios and Specifications

Table 186. Yangzhou Tuoteng Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 187. Yangzhou Tuoteng Main Business

Table 188. Yangzhou Tuoteng Latest Developments

Table 189. Henan Jinzhi Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 190. Henan Jinzhi Phenolic Cotton Sheet Product Portfolios and Specifications

Table 191. Henan Jinzhi Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 192. Henan Jinzhi Main Business

Table 193. Henan Jinzhi Latest Developments

Table 194. Hangzhou Liansheng Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 195. Hangzhou Liansheng Phenolic Cotton Sheet Product Portfolios and Specifications

Table 196. Hangzhou Liansheng Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 197. Hangzhou Liansheng Main Business

Table 198. Hangzhou Liansheng Latest Developments

Table 199. Shenzhen Zhongke Hengrun Basic Information, Phenolic Cotton Sheet Manufacturing Base, Sales Area and Its Competitors

Table 200. Shenzhen Zhongke Hengrun Phenolic Cotton Sheet Product Portfolios and Specifications

Table 201. Shenzhen Zhongke Hengrun Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 202. Shenzhen Zhongke Hengrun Main Business

Table 203. Shenzhen Zhongke Hengrun Latest Developments

Table 204. Hebei Jinghong Electronic Basic Information, Phenolic Cotton Sheet

Manufacturing Base, Sales Area and Its Competitors

Table 205. Hebei Jinghong Electronic Phenolic Cotton Sheet Product Portfolios and Specifications

Table 206. Hebei Jinghong Electronic Phenolic Cotton Sheet Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 207. Hebei Jinghong Electronic Main Business

Table 208. Hebei Jinghong Electronic Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Phenolic Cotton Sheet
- Figure 2. Phenolic Cotton Sheet Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Phenolic Cotton Sheet Sales Growth Rate 2021-2032 (Kilotons)
- Figure 7. Global Phenolic Cotton Sheet Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Phenolic Cotton Sheet Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Phenolic Cotton Sheet Sales Market Share by Country/Region (2025)
- Figure 10. Phenolic Cotton Sheet Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Coarse Weave Cotton Fabric
- Figure 12. Product Picture of Medium Weave Cotton Fabric
- Figure 13. Product Picture of Fine Weave Cotton Fabric
- Figure 14. Global Phenolic Cotton Sheet Sales Market Share by Type in 2026
- Figure 15. Global Phenolic Cotton Sheet Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of F850 / PFCC201 Equivalent
- Figure 17. Product Picture of F852 / PFCC202 Equivalent
- Figure 18. Product Picture of F851 / PFCC203 Equivalent
- Figure 19. Product Picture of Others
- Figure 20. Global Phenolic Cotton Sheet Sales Market Share by Friend Group Benchmark Grade in 2026
- Figure 21. Global Phenolic Cotton Sheet Revenue Market Share by Friend Group Benchmark Grade (2021-2026)
- Figure 22. Product Picture of Thick Plates
- Figure 23. Product Picture of Thin Sheets
- Figure 24. Global Phenolic Cotton Sheet Sales Market Share by Form in 2026
- Figure 25. Global Phenolic Cotton Sheet Revenue Market Share by Form (2021-2026)
- Figure 26. Phenolic Cotton Sheet Consumed in Industrial Machinery
- Figure 27. Global Phenolic Cotton Sheet Market: Industrial Machinery (2021-2026) & (Kilotons)
- Figure 28. Phenolic Cotton Sheet Consumed in Electrical Equipment
- Figure 29. Global Phenolic Cotton Sheet Market: Electrical Equipment (2021-2026) & (Kilotons)

- Figure 30. Phenolic Cotton Sheet Consumed in Others
- Figure 31. Global Phenolic Cotton Sheet Market: Others (2021-2026) & (Kilotons)
- Figure 32. Global Phenolic Cotton Sheet Sale Market Share by Application (2025)
- Figure 33. Global Phenolic Cotton Sheet Revenue Market Share by Application in 2025
- Figure 34. Phenolic Cotton Sheet Sales by Company in 2025 (Kilotons)
- Figure 35. Global Phenolic Cotton Sheet Sales Market Share by Company in 2025
- Figure 36. Phenolic Cotton Sheet Revenue by Company in 2025 (\$ millions)
- Figure 37. Global Phenolic Cotton Sheet Revenue Market Share by Company in 2025
- Figure 38. Global Phenolic Cotton Sheet Sales Market Share by Geographic Region (2021-2026)
- Figure 39. Global Phenolic Cotton Sheet Revenue Market Share by Geographic Region in 2025
- Figure 40. Americas Phenolic Cotton Sheet Sales 2021-2026 (Kilotons)
- Figure 41. Americas Phenolic Cotton Sheet Revenue 2021-2026 (\$ millions)
- Figure 42. APAC Phenolic Cotton Sheet Sales 2021-2026 (Kilotons)
- Figure 43. APAC Phenolic Cotton Sheet Revenue 2021-2026 (\$ millions)
- Figure 44. Europe Phenolic Cotton Sheet Sales 2021-2026 (Kilotons)
- Figure 45. Europe Phenolic Cotton Sheet Revenue 2021-2026 (\$ millions)
- Figure 46. Middle East & Africa Phenolic Cotton Sheet Sales 2021-2026 (Kilotons)
- Figure 47. Middle East & Africa Phenolic Cotton Sheet Revenue 2021-2026 (\$ millions)
- Figure 48. Americas Phenolic Cotton Sheet Sales Market Share by Country in 2025
- Figure 49. Americas Phenolic Cotton Sheet Revenue Market Share by Country (2021-2026)
- Figure 50. Americas Phenolic Cotton Sheet Sales Market Share by Type (2021-2026)
- Figure 51. Americas Phenolic Cotton Sheet Sales Market Share by Application (2021-2026)
- Figure 52. United States Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)
- Figure 53. Canada Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)
- Figure 54. Mexico Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)
- Figure 55. Brazil Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)
- Figure 56. APAC Phenolic Cotton Sheet Sales Market Share by Region in 2025
- Figure 57. APAC Phenolic Cotton Sheet Revenue Market Share by Region (2021-2026)
- Figure 58. APAC Phenolic Cotton Sheet Sales Market Share by Type (2021-2026)
- Figure 59. APAC Phenolic Cotton Sheet Sales Market Share by Application (2021-2026)
- Figure 60. China Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)
- Figure 61. Japan Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)
- Figure 62. South Korea Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)
- Figure 63. Southeast Asia Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$

millions)

Figure 64. India Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 65. Australia Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 66. China Taiwan Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 67. Europe Phenolic Cotton Sheet Sales Market Share by Country in 2025

Figure 68. Europe Phenolic Cotton Sheet Revenue Market Share by Country (2021-2026)

Figure 69. Europe Phenolic Cotton Sheet Sales Market Share by Type (2021-2026)

Figure 70. Europe Phenolic Cotton Sheet Sales Market Share by Application (2021-2026)

Figure 71. Germany Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 72. France Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 73. UK Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 74. Italy Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 75. Russia Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 76. Middle East & Africa Phenolic Cotton Sheet Sales Market Share by Country (2021-2026)

Figure 77. Middle East & Africa Phenolic Cotton Sheet Sales Market Share by Type (2021-2026)

Figure 78. Middle East & Africa Phenolic Cotton Sheet Sales Market Share by Application (2021-2026)

Figure 79. Egypt Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 80. South Africa Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 81. Israel Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 82. Turkey Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 83. GCC Countries Phenolic Cotton Sheet Revenue Growth 2021-2026 (\$ millions)

Figure 84. Manufacturing Cost Structure Analysis of Phenolic Cotton Sheet in 2026

Figure 85. Manufacturing Process Analysis of Phenolic Cotton Sheet

Figure 86. Industry Chain Structure of Phenolic Cotton Sheet

Figure 87. Channels of Distribution

Figure 88. Global Phenolic Cotton Sheet Sales Market Forecast by Region (2027-2032)

Figure 89. Global Phenolic Cotton Sheet Revenue Market Share Forecast by Region (2027-2032)

Figure 90. Global Phenolic Cotton Sheet Sales Market Share Forecast by Type (2027-2032)

Figure 91. Global Phenolic Cotton Sheet Revenue Market Share Forecast by Type (2027-2032)

Figure 92. Global Phenolic Cotton Sheet Sales Market Share Forecast by Application (2027-2032)

Figure 93. Global Phenolic Cotton Sheet Revenue Market Share Forecast by Application (2027-2032)

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