

Gum Rosin Market By Grade (Water White (WW), Window glass (WG), N Grade, X Grade), By Application (Paper Sizing, Adhesives, Rubber and Tire industries, Paints and varnishes, Printing inks, Others): Global Opportunity Analysis and Industry Forecast, 2025-2034

<https://marketpublishers.com/r/GD6D8B53D512EN.html>

Date: August 2025

Pages: 311

Price: US\$ 2,655.00 (Single User License)

ID: GD6D8B53D512EN

Abstracts

The global gum rosin market size was valued at \$1.4 billion in 2024, and is projected to reach \$2.2 billion by 2034, growing at a CAGR of 4.7% from 2025 to 2034.

Gum rosin, a natural organic compound derived from pine trees, is widely used in various industries such as adhesives, inks, rubber, paints, coatings, and paper. It is obtained through the distillation of resin tapped from live pine trees, making it a sustainable and renewable resource. Its chemical properties, such as excellent solubility and adhesive strength, make it a key ingredient in the manufacturing of numerous industrial products. The market for gum rosin is witnessing steady growth due to its broad applications and increase in demand from end-user industries across the globe.

Surge in demand for bio-based and eco-friendly raw materials across several industries drives the growth of the gum rosin market. As regulatory frameworks tighten around petroleum-based products, industries are shifting toward sustainable alternatives, significantly boosting gum rosin adoption. In addition, the expansion of the adhesives and sealants sector, particularly in construction and automotive industries, is expected to propel market growth. Increase in consumption of printing inks in packaging and labeling applications contributes to market expansion. Furthermore, gum rosin's utility in pharmaceuticals and cosmetics for its binding and film-forming properties is enhancing its market demand.

However, fluctuations in raw material supply due to seasonal resin tapping, environmental conditions, and deforestation pose a risk to consistent production. In addition, competition from synthetic substitutes and petroleum-based resins, which often offer lower costs and more consistent quality, hinder gum rosin market growth. Volatility in prices and supply chain disruptions, especially in key producing regions such as China and Indonesia, are other limiting factors.

On the other hand, technological advancements in resin processing and the development of high-performance rosin derivatives offers opportunities for market expansion. Increase in demand for sustainable packaging and green chemicals is likely to open new avenues for market expansion. Emerging economies, especially in Asia-Pacific and Latin America, are anticipated to provide lucrative growth prospects due to rise in industrialization and increase in demand for rosin-based products. In addition, strategic collaborations and investments in R&D to enhance gum rosin applications and production efficiency are expected to support long-term market growth. For instance, in April 2024, Eastman Chemical Company collaborated with Lubrizol to significantly enhance adhesion strength (up 124%) of thermoplastic elastomers over molded onto Eastman's Tritan copolyester

Segment Review

The gum rosin industry is segmented into grade type, application, and region. On the basis of grade type, the market is divided into water white (WW), window glass (WG), N grade, and X grade. On the basis of application, the market is classified into paper sizing, adhesives, rubber & tire industries, paints & varnishes, printing inks, and others. Region-wise, the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

Key Findings

On the basis of grade type, the water white (WW) segment accounted for more than one-fifth of the gum rosin market share in 2024 and is expected to maintain its dominance during the forecast period.

On the basis of application, the paper sizing segment accounted for more than one-third of the gum rosin market share in 2024 and is expected to maintain its dominance during the forecast period.

Region-wise, the Asia-Pacific region accounted for more than half of the gum rosin market share in 2024 and is expected to maintain its dominance during the forecast period.

Competition Analysis

Key players in the gum rosin market include Foreverest Resources Ltd, TER Chemicals GmbH & Co. KG, Himalaya Terpenes Pvt. Ltd, SVD Pinehem Pvt Ltd, Eastman Chemical Company, Harima Chemicals Group, Inc, Arakawa Chemical Industries Ltd, Guangxi Dinghong Resin Co., Ltd, Wuzhou Sun Shine Forestry & Chemicals Co., Ltd, and Kraton Corporation.

Key Benefits For Stakeholders

This report provides a quantitative analysis of the market segments, current trends, estimations, and dynamics of the gum rosin market analysis from 2024 to 2034 to identify the prevailing gum rosin market opportunities.

The market research is offered along with information related to key drivers, restraints, and opportunities.

Porter's five forces analysis highlights the potency of buyers and suppliers to enable stakeholders make profit-oriented business decisions and strengthen their supplier-buyer network.

In-depth analysis of the gum rosin market segmentation assists to determine the prevailing market opportunities.

Major countries in each region are mapped according to their revenue contribution to the global market.

Market player positioning facilitates benchmarking and provides a clear understanding of the present position of the market players.

The report includes the analysis of the regional as well as global gum rosin market trends, key players, market segments, application areas, and market growth strategies.

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Investment Opportunities

Technology Trend Analysis

New Product Development/ Product Matrix of Key Players

Regulatory Guidelines

Additional company profiles with specific to client's interest

Key player details (including location, contact details, supplier/vendor network etc. in excel format)

SWOT Analysis

Key Market Segments By Application

Paper Sizing

Adhesives

Rubber and Tire industries

Paints and varnishes

Printing inks

Others

By Grade

Water White (WW)

Window glass (WG)

N Grade

X Grade

By Region

North America

U.S.

Canada

Mexico

Europe

Germany

UK

France

Spain

Italy

Rest of Europe

Asia-Pacific

China

India

Japan

South Korea

Australia

Rest of Asia-Pacific

LAMEA

Brazil

Saudi Arabia

South Africa

Rest of LAMEA

Key Market Players

Kraton Corporation

TER Chemicals GmbH & Co. KG

Himalaya Terpenes Pvt. Ltd

Arakawa Chemical Industries, Ltd

Guangxi Dinghong Resin Co., Ltd

SVD Pinehem Pvt Ltd

Eastman Chemical Company

Foreverest Resources Ltd

Wuzhou Sun Shine Forestry & Chemicals Co., Ltd.

Harima Chemicals Group, Inc

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