

# Global Rosin Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Rosin market size is expected to reach \$ 1982 million by 2032, rising at a market growth of 2.5% CAGR during the forecast period (2026-2032).

Rosin is the nonvolatile fraction of pine oleoresin and related pine-chemical streams, consisting primarily of resin acids such as abietic-type isomers. In practice the industry recognizes three mutually exclusive sources: gum rosin obtained by distilling tapped oleoresin, tall oil rosin refined from crude tall oil produced in kraft pulping, and the much smaller wood rosin recovered from aged stumps. These routings yield a family of solid resins graded by color and quality (e.g., WW, WG, N, M, K) that determine suitability for high-value applications. In adhesives and sealants, rosin functions as a tackifier backbone and compatibility bridge; in printing inks and coatings it contributes film formation, wetting, and rheology; in rubber compounding and emulsion polymerization it tunes viscoelastic response and dynamic adhesion; and in paper sizing it underpins classical internal sizing chemistries. The supply side is anchored by gum producers in China, Southeast Asia, and Latin America, and by tall-oil refiners concentrated in the Nordics and North America.

Upstream, gum rosin availability depends on sustainable tapping, plantation management, and seasonal labor, while tall oil rosin depends on kraft pulp mill CTO output, distillation capacity, and cut structure at refiners. Procurement at end users typically blends annual contracts and program pricing with quarterly adjustments, especially where specifications tie to color grade and softening point. Large buyers often dual-source across gum and tall-oil grades to stabilize performance and cost. On the downstream side, customers span adhesives and sealants formulators, ink and coating makers, rubber goods and emulsion polymer producers, and paper chemical suppliers. Typical gross margins for mainstream rosin grades and standard tackifier cuts

sit in the low- to mid-10s for integrated suppliers, reflecting moderate technical and certification barriers, logistics intensity for molten shipments, and value added in quality control and application support; higher margins accrue to upgraded derivatives but are outside this study's product boundary.

In the current market, global production is anchored by your finalized baseline: around 1.25 million tonnes with an average selling price near 1,253 USD per tonne on an EXW basis. Supply is structurally mixed between gum and tall-oil streams; industry references indicate gum as the larger share of primary rosin output while tall-oil rosin is concentrated among a smaller set of Nordic and North American refiners. European Union, and India as the largest import demand centers, underscoring Asia-Europe as the gravitational axis of consumption. The vendor landscape remains fragmented on the gum side and more consolidated in tall-oil, so the top five suppliers together control only a minority share of global revenue, with concentration higher in regional TOR niches than in gum rosin at large. Looking out to 2025–2031, demand growth should follow adhesives, packaging inks, and specialty coatings, while constraints will hinge on pulp-industry CTO availability, plantation tapping economics, and environmental compliance across key producing regions.

This report studies the global Rosin production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Rosin 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 Rosin that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Rosin total production and demand, 2021-2032, (K MT)

Global Rosin total production value, 2021-2032, (USD Million)

Global Rosin production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Rosin consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Rosin domestic production, consumption, key domestic manufacturers and share

Global Rosin production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Rosin production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Rosin production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Rosin 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 Perum Perhutani, Resinas Brasil Group, Midhills Rosin and Turpentine, Ingevity Corporation, Kraton Corporation, Forchem Oyj, SunPine AB, Fintoil Oy, Pine Chemical Group Oy, Lesokhimik JSC, 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 Rosin market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 Rosin Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Rosin Market, Segmentation by Type:

Gum Rosin

Tall Oil Rosin

Wood Rosin

#### Global Rosin Market, Segmentation by Grade:

X Grade

WW Grade

WG Grade

N / M / K Grade

Others (off-spec & blends)

#### Global Rosin Market, Segmentation by Channel:

Direct Sale

Indirect Sale

Global Rosin Market, Segmentation by Application:

Adhesives & Sealants

Printing Inks

Paints & Coatings

Rubber Compounding

Paper Sizing

Others

Companies Profiled:

Perum Perhutani

Resinas Brasil Group

Midhills Rosin and Turpentine

Ingevity Corporation

Kraton Corporation

Forchem Oyj

SunPine AB

Fintoil Oy

Pine Chemical Group Oy

Lesokhimik JSC

Wuzhou Sun Shine Forestry and Chemicals Co., Ltd.

Guangdong Komo Pine Chemicals Co., Ltd.

Deqing Jixin

Feishang

Resin Chemicals

Songquan Forest Chemical

**Key Questions Answered:**

1. How big is the global Rosin market?
2. What is the demand of the global Rosin market?
3. What is the year over year growth of the global Rosin market?
4. What is the production and production value of the global Rosin market?
5. Who are the key producers in the global Rosin market?
6. What are the growth factors driving the market demand?

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