

Global Tall Oil Rosin (TOR) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Tall Oil Rosin (TOR) market size is expected to reach \$ 521 million by 2032, rising at a market growth of 3.9% CAGR during the forecast period (2026-2032).

Tall oil rosin (TOR) is the rosin fraction obtained by vacuum distillation of crude tall oil (CTO), a renewable by-product of Kraft pulping. Chemically, TOR is a UVCB mixture dominated by abietic-type resin acids (abietic, dehydroabietic, palustric, neoabietic, isopimaric, etc.) with a small portion of unsaponifiables. It is supplied as unmodified rosin (various grades such as X/WW/WG/N) and delivered molten in bulk or in solid forms like flakes and pastilles. TOR's role is foundational: it is the bio-based tackifier/acid functionality feedstock behind rosin esters, fortified rosin, soaps and emulsifiers used throughout adhesives, paper sizing, inks/coatings and elastomers. Public product data sheets from leading suppliers describe typical acid numbers and softening-point ranges used by formulators to select the right balance of tack, film formation and compatibility.

Upstream, the key constraint is CTO availability and its regional concentration in North America and Northern Europe kraft mills. The distillation split yields two primary streams—tall oil fatty acids (TOFA) and tall oil rosin—plus turpentine and pitch; installed debottlenecking and new Nordic capacity since 2022 (e.g., Fintoil start-up; SunPine/Lawter integration history) improved cut flexibility and product quality. Downstream, TOR flows into hot-melt and pressure-sensitive adhesives, printing ink binders, paper sizing agents, and synthetic rubber compounding—sectors that value renewable content and acid functionality. Kraton (SYLVAROS™), Ingevity (rosin/soaps), Forchem (TOR grades), SunPine (TOR SDS), Fintoil (FinTOR), Pine Chemical Group and Lesokhimik are major players. Typical procurement is a mix of annual/biannual supply contracts indexed to feedstock/energy and spot parcels for specialty grades;

relationships are sticky due to qualification cycles and melt-handling logistics. Industry sources suggest mid-10s gross margins for well-run integrated pine-chemical assets when feedstock supply is secure and energy costs are hedged; margin variability tracks CTO differentials, energy and derivative demand.

In the current market, global production is around 358 thousand tonnes in 2024, with an average selling price of about USD 1,053 per tonne (EXW). The supplier landscape is anchored by North American and Nordic players (Ingevity, Kraton, Forchem, SunPine, Fintoil) plus regional suppliers (Pine Chemical Group, Lesokhimik) and downstream brands handling TOR-based rosins/soaps (Lawter/Harima). Based on disclosed plant footprints, trade flows and product portfolios, the Top 5 suppliers control ~60% of global revenue (CR5). Demand is concentrated in Europe and North America (paper/packaging, adhesives, printing), with incremental growth in Asia where rubber and packaging applications expand alongside bio-based procurement targets. Looking toward 2025–2031, directionally we assume modest volume growth from CTO availability, Nordic operating rates and debottlenecking, while unit pricing normalizes toward long-run replacement cost as energy and logistics pressures ease; the main bottlenecks are CTO supply, mill integration decisions, and qualification/handling constraints for molten deliveries. Key risks are pulp-mill shutdowns (affecting CTO yield), regulatory pushes around chemistries downstream, and competition from gum rosin in specific grades—though TOR retains an advantage in certain quality/consistency windows for adhesives and paper chemicals.

This report studies the global Tall Oil Rosin (TOR) production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

U.S. VS China: Tall Oil Rosin (TOR) domestic production, consumption, key domestic manufacturers and share

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

Global Tall Oil Rosin (TOR) production by Grade, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

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

This report profiles key players in the global Tall Oil Rosin (TOR) 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 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 Tall Oil Rosin (TOR) 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 Grade, 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 Tall Oil Rosin (TOR) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tall Oil Rosin (TOR) Market, Segmentation by Grade:

X Grade

WW Grade

WG Grade

N / M / K Grade

Others (off-spec & blends)

Global Tall Oil Rosin (TOR) Market, Segmentation by Delivery Form:

Molten (bulk heated)

Flakes / Pastilles

Drums / IBC (solidified)

Global Tall Oil Rosin (TOR) Market, Segmentation by Channel:

Direct Sale

Indirect Sale

Global Tall Oil Rosin (TOR) Market, Segmentation by Application:

Adhesives & Hot-melt

Printing Inks & Coatings

Paper Sizing & Papermaking

Rubber & Tires

Other Industrial

Companies Profiled:

Ingevity Corporation

Kraton Corporation

Forchem Oyj

SunPine AB

Fintoil Oy

Pine Chemical Group Oy

Lesokhimik JSC

Key Questions Answered:

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

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