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Pine-Derived Chemicals Market by Type (TOFA, TOR, Gum Turpentine, Gum Rosin, Pitch, and Sterols), Application (Paints & Coatings, Adhesives & Sealants, Surfactants, and Printing Inks), Source, Process and Region - Global Forecast to 2027

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Abstracts

According to MarketsandMarkets, the pine-derived chemicals market is estimated to be valued at USD 5.5 billion in 2022 and is projected to reach USD 6.8 billion by 2027, recording a CAGR of 4.5%, in terms of value. An increase in awareness regarding renewable and bio-based products has resulted in an upsurge in the demand for pine-derived chemicals over the past few years. Pine-derived chemicals is a major commercial product of pine trees and it is used in the manufacturing of paints & coatings, adhesives & sealants, surfactants, and printing inks. Major market players have been investing significantly in R&D to boost production to cater to changing consumer preferences.

“By type, the gum rosin segment is projected to grow at the highest CAGR in the market during the forecast period.”

Based on type, the gum rosin segment is projected to grow at the highest CAGR in the market during the forecast period. Gum rosin is the oleoresin that is harvested by the periodic wounding of the tree and collecting the sap into cups. During the production of synthetic rubber and printing inks, resin acids are modified for further industrial use. Apart from this, gum rosin is used in the paints & coating industries, owing to this the demand for gum rosin is increasing.

“By source, by-products of sulfate pulping segment is estimated to grow at higher CAGR.”

Sulfate processing is used to produce pine wood pulp, which consists of almost pure cellulose fibers by using sulfurous acid to extract the lignin from wood chips in digesters. Two main by-products, CTO and CST, are obtained in the pinewood pulping procedure. Both CTO and CST are used as a primary raw material to obtain pine chemicals like resins, fatty acids, etc. These pine chemicals demand is increasing due to their application in textile, fuel additives, construction chemicals, paints & coating, rubber, soaps & detergents, etc.

“By application, the adhesives & sealants segment is forecasted to account for the second-largest market share.”

Adhesives & sealants are versatile products that are obtained from pine trees. The automotive and construction industries are the two key sectors that use adhesives and sealants extensively. The natural stickiness of rosin makes it an ideal adhesion enhancer when added to adhesives and sealants. The players in the adhesives and sealants industry are expanding their presence across the globe.

“By process, the tapping process segment is anticipated to grow at higher CAGR during the review period.”

Tapping is a repeated wounding process of the tree trunk, which removes the bark and tissues beneath. There is a chemical stimulant application after this process to obtain Crude oleoresin, which is evaporated with steam distillation to obtain turpentine, molten rosin remains at the bottom after turpentine has been evaporated and recovered from a condenser. This rosin has a huge demand in the manufacturing of adhesives & sealants and paints & coatings.

“The North America region is the largest market for pine-derived chemicals during the forecast period”

North America is one of the largest markets for pine-derived chemicals worldwide as it holds a considerable share in the tall oil fatty acid segment. There has been a significant usage of pine-derived chemicals to produce a wide range of consumer products. North America has a developed market for pine-derived chemicals and is projected to grow at a steady rate. The US contributes to more than half of the North American pine-derived chemicals market, owing to this, there is a strong presence of key manufacturers in the region. Moreover, large pine tree plantations are concentrated in North America, encouraging the growth and expansion of the pine chemicals industry.

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The North American market is dominated by tall oil fatty acids and gum rosin markets due to their applications in a large variety of consumer products.

Break-up of Primaries

- By Company Type: Tier 1 – 30%, Tier 2 – 25% and Tier 3 – 45%
- By Designation: Manager- 25%, CXOs– 40%, and Executives – 35%
- By Region: Asia Pacific – 40%, Europe - 30%, North America- 16%, and RoW- 14%

Leading players profiled in this report include the following:

- Eastman Chemical Company (US)
- Harima Chemicals Group (Japan)
- Ingevity Corporation (US)
- Kraton Corporation (US)
- Mentha And Allied Products Pvt Ltd (India)
- Mahendra Rosin And Turpentine Pvt Ltd (India)
- Arakawa Chemical Industries, Ltd (Japan)
- George-Pacific Chemicals (US)
- Forchem OYJ (Finland)
- Florachem Corporation (US)
- Drt (D?riv?s R?siniques Et Terp?niques (France)
- Foreverest Resources Ltd (China)

Wuzhou Sunshine Forestry & Chemicals Co. Ltd (China)

Guilin Songquan Forest Chemical Co. Ltd (China)

Midhills Rosin & Turpenes (India)

Resinas Alfonso Criado Mart?n (Spain)

Florpinus Chemical Industries (Brazil)

Pinechemical Group Oy (Finland)

Punjab Rosin & Chemical Works (India)

Keichem Indonesia (Indonesia)

Research Coverage

This report segments pine-derived chemicals market on the basis of source, type, application, process, and region. In terms of insights, this research report focuses on various levels of analyses—competitive landscape, pricing insights, end-use analysis, and company profiles—which together comprise and discuss the basic views on the emerging & high-growth segments of the pine-derived chemicals market, high-growth regions, countries, industry trends, drivers, restraints, opportunities, and challenges.

Reasons to buy this report

To get a comprehensive overview of the pine-derived chemicals market

To gain wide-ranging information about the top players in this industry, their product portfolio details, and the key strategies adopted by them

To gain insights about the major countries/regions, in which the pine-derived chemicals market is flourishing

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Business Overview, Products/Services/Solutions Offered, Recent Developments, and MnM View might not be captured in case of unlisted companies.

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