

Rosin Ester Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Rosin Ester Market Summary

Introduction

Rosin Ester is a resin derived from rosin through esterification, used as a tackifier in adhesives, a base in chewing gum, a binder in depilatory waxes, and other applications. Its natural origin and adhesive properties make it valuable in consumer and industrial products. The industry is a key segment of the pine chemicals market, characterized by its bio-based nature, versatility, and reliance on pine resin supply. The market is driven by demand for natural adhesives, growth in personal care products, and industrial applications, particularly in developed and emerging markets. However, it faces challenges from raw material scarcity, competition from synthetic tackifiers, and price volatility, shaping its growth path.

Market Size and Growth Forecast

The global Rosin Ester market is estimated at USD 50 to 60 million in 2025, with a projected CAGR of 3.3% to 4.4% from 2025 to 2030, reaching USD 60 to 75 million by 2030. This growth reflects steady demand, supported by sustainability trends.

Regional Analysis

North America: Holding 25-30%, North America grows at 2.5-3.5%. The US leads in adhesives and chewing gum, focusing on natural ingredients.

Europe: Accounting for 30-35%, Europe grows at 3-4%. Germany and France drive adhesive and wax uses, with trends toward bio-based products.

Asia Pacific: Representing 25-30%, this region grows at 4.5-5.5%. China and India boost demand in adhesives, with trends emphasizing cost-effective natural solutions.

Rest of the World: With 5-10%, this region grows at 3-4%. Brazil sees demand in industrial adhesives, driven by manufacturing growth.

Application Analysis

Adhesive: Expected to grow at 3.5-4.5%, enhancing tack in bonding. Trends focus on sustainability.

Chewing Gum: Projected at 3-4%, providing texture. Trends emphasize natural bases.

Depilatory Waxes: Anticipated at 3-4%, binding wax formulations. Trends target personal care growth.

Others: Expected at 2.5-3.5%, covering niche uses. Trends explore industrial applications.

Key Market Players

Kraton: Offers rosin esters for adhesives.

DRT: Specializes in bio-based tackifiers.

Arakawa Chemical Industries: Provides rosin esters for industrial uses.

Ingevity: Focuses on adhesive solutions.

These firms compete on quality and sustainability.

Porter's Five Forces Analysis

Threat of New Entrants: Medium; raw material access limits entry.

Threat of Substitutes: Medium; synthetics compete, but rosin's natural appeal sustains demand.

Bargaining Power of Buyers: High; adhesive and gum makers negotiate pricing.

Bargaining Power of Suppliers: Medium; pine resin supply gives leverage, offset by sourcing.

Competitive Rivalry: High; players focus on innovation and cost.

Market Opportunities and Challenges

Opportunities:

- Demand for natural adhesives in Asia Pacific grows.
- Sustainability trends boost rosin ester use.
- Personal care expansion offers potential.

Challenges:

- Pine resin scarcity limits supply.
- Synthetic alternatives challenge market share.
- Price volatility affects profitability.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method

CHAPTER 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 Rosin Ester Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 TRADING ANALYSIS

- 8.1 Export of Rosin Ester by Region
- 8.2 Import of Rosin Ester by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST ROSIN ESTER MARKET IN NORTH AMERICA (2020-2030)

- 9.1 Rosin Ester Market Size
- 9.2 Rosin Ester Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
 - 9.5.1 United States
 - 9.5.2 Canada
 - 9.5.3 Mexico

CHAPTER 10 HISTORICAL AND FORECAST ROSIN ESTER MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 Rosin Ester Market Size
- 10.2 Rosin Ester Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
 - 10.5.1 Brazil
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

CHAPTER 11 HISTORICAL AND FORECAST ROSIN ESTER MARKET IN ASIA & PACIFIC (2020-2030)

- 11.1 Rosin Ester Market Size
- 11.2 Rosin Ester Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
 - 11.5.1 China
 - 11.5.2 India
 - 11.5.3 Japan
 - 11.5.4 South Korea
 - 11.5.5 Southeast Asia
 - 11.5.6 Australia

CHAPTER 12 HISTORICAL AND FORECAST ROSIN ESTER MARKET IN EUROPE (2020-2030)

- 12.1 Rosin Ester Market Size
- 12.2 Rosin Ester Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
 - 12.5.1 Germany
 - 12.5.2 France
 - 12.5.3 United Kingdom
 - 12.5.4 Italy
 - 12.5.5 Spain
 - 12.5.6 Belgium
 - 12.5.7 Netherlands
 - 12.5.8 Austria
 - 12.5.9 Poland
 - 12.5.10 Russia

CHAPTER 13 HISTORICAL AND FORECAST ROSIN ESTER MARKET IN MEA (2020-2030)

- 13.1 Rosin Ester Market Size
- 13.2 Rosin Ester Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL ROSIN ESTER MARKET (2020-2025)

- 14.1 Rosin Ester Market Size
- 14.2 Rosin Ester Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

CHAPTER 15 GLOBAL ROSIN ESTER MARKET FORECAST (2025-2030)

- 15.1 Rosin Ester Market Size Forecast
- 15.2 Rosin Ester Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 Kraton
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Rosin Ester Information
 - 16.1.3 SWOT Analysis of Kraton
 - 16.1.4 Kraton Rosin Ester Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 DRT
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Rosin Ester Information
 - 16.2.3 SWOT Analysis of DRT
 - 16.2.4 DRT Rosin Ester Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 Arakawa Chemical Industries
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Rosin Ester Information
 - 16.3.3 SWOT Analysis of Arakawa Chemical Industries
 - 16.3.4 Arakawa Chemical Industries Rosin Ester Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.4 Ingevity

16.4.1 Company Profile
16.4.2 Main Business and Rosin Ester Information
16.4.3 SWOT Analysis of Ingevity
16.4.4 Ingevity Rosin Ester Sales, Revenue, Price and Gross Margin (2020-2025)
16.5 Harima Chemicals
16.5.1 Company Profile
16.5.2 Main Business and Rosin Ester Information
16.5.3 SWOT Analysis of Harima Chemicals
16.5.4 Harima Chemicals Rosin Ester Sales, Revenue, Price and Gross Margin (2020-2025)
Please ask for sample pages for full companies list
Tables and Figures
Table Abbreviation and Acronyms List
Table Research Scope of Rosin Ester Report
Table Data Sources of Rosin Ester Report
Table Major Assumptions of Rosin Ester Report
Figure Market Size Estimated Method
Figure Major Forecasting Factors
Figure Rosin Ester Picture
Table Rosin Ester Classification
Table Rosin Ester Applications List
Table Drivers of Rosin Ester Market
Table Restraints of Rosin Ester Market
Table Opportunities of Rosin Ester Market
Table Threats of Rosin Ester Market
Table Raw Materials Suppliers List
Table Different Production Methods of Rosin Ester
Table Cost Structure Analysis of Rosin Ester
Table Key End Users List
Table Latest News of Rosin Ester Market
Table Merger and Acquisition List
Table Planned/Future Project of Rosin Ester Market
Table Policy of Rosin Ester Market
Table 2020-2030 Regional Export of Rosin Ester
Table 2020-2030 Regional Import of Rosin Ester
Table 2020-2030 Regional Trade Balance
Figure 2020-2030 Regional Trade Balance
Table 2020-2030 North America Rosin Ester Market Size and Market Volume List
Figure 2020-2030 North America Rosin Ester Market Size and CAGR

Figure 2020-2030 North America Rosin Ester Market Volume and CAGR
Table 2020-2030 North America Rosin Ester Demand List by Application
Table 2020-2025 North America Rosin Ester Key Players Sales List
Table 2020-2025 North America Rosin Ester Key Players Market Share List
Table 2020-2030 North America Rosin Ester Demand List by Type
Table 2020-2025 North America Rosin Ester Price List by Type
Table 2020-2030 United States Rosin Ester Market Size and Market Volume List
Table 2020-2030 United States Rosin Ester Import & Export List
Table 2020-2030 Canada Rosin Ester Market Size and Market Volume List
Table 2020-2030 Canada Rosin Ester Import & Export List
Table 2020-2030 Mexico Rosin Ester Market Size and Market Volume List
Table 2020-2030 Mexico Rosin Ester Import & Export List
Table 2020-2030 South America Rosin Ester Market Size and Market Volume List
Figure 2020-2030 South America Rosin Ester Market Size and CAGR
Figure 2020-2030 South America Rosin Ester Market Volume and CAGR
Table 2020-2030 South America Rosin Ester Demand List by Application
Table 2020-2025 South America Rosin Ester Key Players Sales List
Table 2020-2025 South America Rosin Ester Key Players Market Share List
Table 2020-2030 South America Rosin Ester Demand List by Type
Table 2020-2025 South America Rosin Ester Price List by Type
Table 2020-2030 Brazil Rosin Ester Market Size and Market Volume List
Table 2020-2030 Brazil Rosin Ester Import & Export List
Table 2020-2030 Argentina Rosin Ester Market Size and Market Volume List
Table 2020-2030 Argentina Rosin Ester Import & Export List
Table 2020-2030 Chile Rosin Ester Market Size and Market Volume List
Table 2020-2030 Chile Rosin Ester Import & Export List
Table 2020-2030 Peru Rosin Ester Market Size and Market Volume List
Table 2020-2030 Peru Rosin Ester Import & Export List
Table 2020-2030 Asia & Pacific Rosin Ester Market Size and Market Volume List
Figure 2020-2030 Asia & Pacific Rosin Ester Market Size and CAGR
Figure 2020-2030 Asia & Pacific Rosin Ester Market Volume and CAGR
Table 2020-2030 Asia & Pacific Rosin Ester Demand List by Application
Table 2020-2025 Asia & Pacific Rosin Ester Key Players Sales List
Table 2020-2025 Asia & Pacific Rosin Ester Key Players Market Share List
Table 2020-2030 Asia & Pacific Rosin Ester Demand List by Type
Table 2020-2025 Asia & Pacific Rosin Ester Price List by Type
Table 2020-2030 China Rosin Ester Market Size and Market Volume List
Table 2020-2030 China Rosin Ester Import & Export List
Table 2020-2030 India Rosin Ester Market Size and Market Volume List

Table 2020-2030 India Rosin Ester Import & Export List
Table 2020-2030 Japan Rosin Ester Market Size and Market Volume List
Table 2020-2030 Japan Rosin Ester Import & Export List
Table 2020-2030 South Korea Rosin Ester Market Size and Market Volume List
Table 2020-2030 South Korea Rosin Ester Import & Export List
Table 2020-2030 Southeast Asia Rosin Ester Market Size List
Table 2020-2030 Southeast Asia Rosin Ester Market Volume List
Table 2020-2030 Southeast Asia Rosin Ester Import List
Table 2020-2030 Southeast Asia Rosin Ester Export List
Table 2020-2030 Australia Rosin Ester Market Size and Market Volume List
Table 2020-2030 Australia Rosin Ester Import & Export List
Table 2020-2030 Europe Rosin Ester Market Size and Market Volume List
Figure 2020-2030 Europe Rosin Ester Market Size and CAGR
Figure 2020-2030 Europe Rosin Ester Market Volume and CAGR
Table 2020-2030 Europe Rosin Ester Demand List by Application
Table 2020-2025 Europe Rosin Ester Key Players Sales List
Table 2020-2025 Europe Rosin Ester Key Players Market Share List
Table 2020-2030 Europe Rosin Ester Demand List by Type
Table 2020-2025 Europe Rosin Ester Price List by Type
Table 2020-2030 Germany Rosin Ester Market Size and Market Volume List
Table 2020-2030 Germany Rosin Ester Import & Export List
Table 2020-2030 France Rosin Ester Market Size and Market Volume List
Table 2020-2030 France Rosin Ester Import & Export List
Table 2020-2030 United Kingdom Rosin Ester Market Size and Market Volume List
Table 2020-2030 United Kingdom Rosin Ester Import & Export List
Table 2020-2030 Italy Rosin Ester Market Size and Market Volume List
Table 2020-2030 Italy Rosin Ester Import & Export List
Table 2020-2030 Spain Rosin Ester Market Size and Market Volume List
Table 2020-2030 Spain Rosin Ester Import & Export List
Table 2020-2030 Belgium Rosin Ester Market Size and Market Volume List
Table 2020-2030 Belgium Rosin Ester Import & Export List
Table 2020-2030 Netherlands Rosin Ester Market Size and Market Volume List
Table 2020-2030 Netherlands Rosin Ester Import & Export List
Table 2020-2030 Austria Rosin Ester Market Size and Market Volume List
Table 2020-2030 Austria Rosin Ester Import & Export List
Table 2020-2030 Poland Rosin Ester Market Size and Market Volume List
Table 2020-2030 Poland Rosin Ester Import & Export List
Table 2020-2030 Russia Rosin Ester Market Size and Market Volume List
Table 2020-2030 Russia Rosin Ester Import & Export List

Table 2020-2030 MEA Rosin Ester Market Size and Market Volume List	
Figure 2020-2030 MEA Rosin Ester Market Size and CAGR	
Figure 2020-2030 MEA Rosin Ester Market Volume and CAGR	
Table 2020-2030 MEA Rosin Ester Demand List by Application	
Table 2020-2025 MEA Rosin Ester Key Players Sales List	
Table 2020-2025 MEA Rosin Ester Key Players Market Share List	
Table 2020-2030 MEA Rosin Ester Demand List by Type	
Table 2020-2025 MEA Rosin Ester Price List by Type	
Table 2020-2030 Egypt Rosin Ester Market Size and Market Volume List	
Table 2020-2030 Egypt Rosin Ester Import & Export List	
Table 2020-2030 Israel Rosin Ester Market Size and Market Volume List	
Table 2020-2030 Israel Rosin Ester Import & Export List	
Table 2020-2030 South Africa Rosin Ester Market Size and Market Volume List	
Table 2020-2030 South Africa Rosin Ester Import & Export List	
Table 2020-2030 Gulf Cooperation Council Countries Rosin Ester Market Size and Market Volume List	
Table 2020-2030 Gulf Cooperation Council Countries Rosin Ester Import & Export List	
Table 2020-2030 Turkey Rosin Ester Market Size and Market Volume List	
Table 2020-2030 Turkey Rosin Ester Import & Export List	
Table 2020-2025 Global Rosin Ester Market Size List by Region	
Table 2020-2025 Global Rosin Ester Market Size Share List by Region	
Table 2020-2025 Global Rosin Ester Market Volume List by Region	
Table 2020-2025 Global Rosin Ester Market Volume Share List by Region	
Table 2020-2025 Global Rosin Ester Demand List by Application	
Table 2020-2025 Global Rosin Ester Demand Market Share List by Application	
Table 2020-2025 Global Rosin Ester Capacity List	
Table 2020-2025 Global Rosin Ester Key Vendors Capacity Share List	
Table 2020-2025 Global Rosin Ester Key Vendors Production List	
Table 2020-2025 Global Rosin Ester Key Vendors Production Share List	
Figure 2020-2025 Global Rosin Ester Capacity Production and Growth Rate	
Table 2020-2025 Global Rosin Ester Key Vendors Production Value List	
Figure 2020-2025 Global Rosin Ester Production Value and Growth Rate	
Table 2020-2025 Global Rosin Ester Key Vendors Production Value Share List	
Table 2020-2025 Global Rosin Ester Demand List by Type	
Table 2020-2025 Global Rosin Ester Demand Market Share List by Type	
Table 2020-2025 Regional Rosin Ester Price List	
Table 2025-2030 Global Rosin Ester Market Size List by Region	
Table 2025-2030 Global Rosin Ester Market Size Share List by Region	
Table 2025-2030 Global Rosin Ester Market Volume List by Region	

Table 2025-2030 Global Rosin Ester Market Volume Share List by Region	
Table 2025-2030 Global Rosin Ester Demand List by Application	
Table 2025-2030 Global Rosin Ester Demand Market Share List by Application	
Table 2025-2030 Global Rosin Ester Capacity List	
Table 2025-2030 Global Rosin Ester Key Vendors Capacity Share List	
Table 2025-2030 Global Rosin Ester Key Vendors Production List	
Table 2025-2030 Global Rosin Ester Key Vendors Production Share List	
Figure 2025-2030 Global Rosin Ester Capacity Production and Growth Rate	
Table 2025-2030 Global Rosin Ester Key Vendors Production Value List	
Figure 2025-2030 Global Rosin Ester Production Value and Growth Rate	
Table 2025-2030 Global Rosin Ester Key Vendors Production Value Share List	
Table 2025-2030 Global Rosin Ester Demand List by Type	
Table 2025-2030 Global Rosin Ester Demand Market Share List by Type	
Table 2025-2030 Rosin Ester Regional Price List	
Table Kraton Information	
Table SWOT Analysis of Kraton	
Table 2020-2025 Kraton Rosin Ester Product Capacity Production Price Cost Production Value	
Figure 2020-2025 Kraton Rosin Ester Capacity Production and Growth Rate	
Figure 2020-2025 Kraton Rosin Ester Market Share	
Table DRT Information	
Table SWOT Analysis of DRT	
Table 2020-2025 DRT Rosin Ester Product Capacity Production Price Cost Production Value	
Figure 2020-2025 DRT Rosin Ester Capacity Production and Growth Rate	
Figure 2020-2025 DRT Rosin Ester Market Share	
Table Arakawa Chemical Industries Information	
Table SWOT Analysis of Arakawa Chemical Industries	
Table 2020-2025 Arakawa Chemical Industries Rosin Ester Product Capacity Production Price Cost Production Value	
Figure 2020-2025 Arakawa Chemical Industries Rosin Ester Capacity Production and Growth Rate	
Figure 2020-2025 Arakawa Chemical Industries Rosin Ester Market Share	
Table Ingevity Information	
Table SWOT Analysis of Ingevity	
Table 2020-2025 Ingevity Rosin Ester Product Capacity Production Price Cost Production Value	
Figure 2020-2025 Ingevity Rosin Ester Capacity Production and Growth Rate	
Figure 2020-2025 Ingevity Rosin Ester Market Share	

Table Harima Chemicals Information

Table SWOT Analysis of Harima Chemicals

Table 2020-2025 Harima Chemicals Rosin Ester Product Capacity Production Price
Cost Production Value

Figure 2020-2025 Harima Chemicals Rosin Ester Capacity Production and Growth Rate

Figure 2020-2025 Harima Chemicals Rosin Ester Market Share

Table Guangdong Komo Group Information

Table SWOT Analysis of Guangdong Komo Group

Table 2020-2025 Guangdong Komo Group Rosin Ester Product Capacity Production
Price Cost Production Value

Figure 2020-2025 Guangdong Komo Group Rosin Ester Capacity Production and
Growth Rate

Figure 2020-2025 Guangdong Komo Group Rosin Ester Market Share

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