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# Tall Oil Rosin Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, By Grade (X Grade, WG Grade, and Others), By Application (Fuel Additives, Mining Chemicals, Adhesives, Coatings and Inks, and Others) By Region & Competition, 2021-2031F

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## Abstracts

The Global Tall Oil Rosin Market is projected to expand from USD 0.79 Billion in 2025 to USD 1.02 Billion by 2031, registering a CAGR of 4.35%. Derived via the distillation of crude tall oil?a byproduct of the kraft pulping process in paper manufacturing?Tall Oil Rosin (TOR) is a vital bio-based resinous material primarily composed of resin acids. It serves as a key sustainable component in the formulation of adhesives, printing inks, and rubber products. This market expansion is fundamentally driven by the accelerating industrial transition toward renewable chemical options, as manufacturers increasingly seek biodegradable substitutes for petroleum-based hydrocarbon resins to satisfy strict sustainability mandates.

However, the market encounters significant obstacles due to the limited availability of its primary feedstock, a situation worsened by stagnant paper production and intensified competition from the biofuels industry. Highlighting the economic scale of the parent supply chain, the Finnish Forest Industries Federation reported that forest industry exports from Finland, a major global producer of tall oil feedstock, totaled roughly EUR 12 billion in 2024. This finite biomass supply restricts the capacity of rosin producers to fully exploit the growing global appetite for green chemicals, limiting their ability to capitalize on market demand.

**Market Driver**

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The vigorous expansion of the global adhesives and sealants sector serves as a primary catalyst for the tall oil rosin market. Functioning as a critical tackifier resin, tall oil rosin imparts necessary adhesion and cohesion properties to pressure-sensitive adhesives widely utilized in packaging, bookbinding, and hygiene applications. This downstream growth directly boosts the consumption of rosin derivatives, as manufacturers demand dependable, bio-based inputs to uphold performance standards while increasing output. For instance, H.B. Fuller's 'Preliminary Fiscal Year 2024 Results' in January 2025 projected net revenue of approximately USD 3.57 billion, emphasizing the substantial economic scale of the adhesive industry that underpins the demand for raw materials like tall oil rosin.

Concurrently, the rising demand for bio-based and sustainable chemical alternatives is fundamentally altering market dynamics. End-users are increasingly prioritizing pine-derived chemicals over hydrocarbon resins to comply with environmental regulations and consumer preferences for green products. This trend requires rosin producers to prove tangible sustainability metrics, solidifying the material's role as a low-carbon feedstock. As evidence of this commitment, Kraton Corporation's '2024 Sustainability Report' in June 2025 noted a 41% reduction in Scope 1 and 2 greenhouse gas emissions. Additionally, Ingevity reported third-quarter 2025 sales of USD 139.9 million for its Performance Chemicals division, driven by the continued utility of tall oil derivatives across diverse industrial applications.

**Market Challenge**

The shortage of Crude Tall Oil (CTO) presents a major barrier to the expansion of the tall oil rosin sector. Since CTO is produced exclusively as a byproduct of the kraft pulping process, its supply is inelastic and contingent upon paper mill operating rates rather than the immediate requirements of chemical manufacturers. This creates a disconnect where the growing need for sustainable adhesives and inks cannot be satisfied through increased production. The issue is further exacerbated by the energy sector's growing use of CTO as a feedstock for renewable diesel, which diverts critical volumes away from rosin fractionation.

This supply limitation is evidenced by the contracting industrial base for paper products, which limits the production of black liquor soap. According to the American Forest & Paper Association, U.S. paper and paperboard capacity fell by 2.0% in 2024 relative to the prior year. This decline in manufacturing infrastructure directly reduces the raw material available to fractionators, compelling rosin producers to contend with volatile

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feedstock availability that hampers their ability to finalize long-term contracts and leverage the global transition toward green chemistry.

## Market Trends

The expansion into bio-based surfactants and rubber emulsifiers is gaining traction as tire manufacturers actively replace petrochemicals with renewable feedstocks to meet circularity objectives. Tall oil derivatives are increasingly being adopted as sustainable processing aids and emulsifiers in synthetic rubber manufacturing, providing a reduced carbon footprint while maintaining essential performance traits such as rolling resistance and grip. This trend is illustrated by major automotive suppliers incorporating silanized tall oil and other bio-based fractions into tire compounds to lessen reliance on fossil-based inputs. For example, Continental Tires reported in a June 2025 press release that renewable and recycled materials accounted for an average of 26 percent of its tire production in 2024, a milestone explicitly attributed to the adoption of bio-based alternatives like tall oil.

Simultaneously, the strategic substitution of gum rosin in offset printing inks is accelerating as formulators favor supply chain stability and environmental compliance over conventional sourcing methods. Tall oil rosin is emerging as the preferred tackifier in offset and flexographic inks due to its reliable supply from the kraft pulping process, in contrast to the volatile and labor-intensive harvesting of gum rosin. This shift is further driven by the demand for biorenewable content in packaging inks to satisfy rigorous food-contact and compostability requirements. In its 'Fifteenth Annual Sustainability Report' from December 2025, Sun Chemical noted it had achieved 86 percent of its 2030 emissions and circularity targets, a progress driven significantly by reformulating product lines like SunPak to utilize high-performance, bio-based resin technologies.

## Key Market Players

Georgia-Pacific Chemicals LLC

Kraton Corporation

GrantChem, Inc.

Eastman Chemical Company

Forchem Oyj

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Foreverest Resources Ltd.

Harima Chemicals Group Inc.

Ilim Group

Sunpine AB

Ingevity Corp

**Report Scope**

In this report, the Global Tall Oil Rosin Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Tall Oil Rosin Market, By Grade

X Grade

WG Grade

Others

Tall Oil Rosin Market, By Application

Fuel Additives

Mining Chemicals

Adhesives

Coatings and Inks

Others

Tall Oil Rosin Market, By Region

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North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

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Middle East & Africa

South Africa

Saudi Arabia

UAE

**Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Tall Oil Rosin Market.

**Available Customizations:**

Global Tall Oil Rosin Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

**Company Information**

Detailed analysis and profiling of additional market players (up to five).

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