



Global Rosin Resin Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Indicator	Value
Market size (2025)	USD 2.5 bn
Forecast (2031)	USD 3.6 bn
CAGR (2021-2031)	6%
Study period	2021-2031
Largest region	Asia-Pacific · 44.3%
Fastest-growing region	Asia-Pacific · 6.8%
Market concentration	Moderate
Licence	Individual / Company

The global rosin resin market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Adhesives and sealants account for XX% of demand as packaging, hygiene, tapes, labels and construction formulations increase their use of renewable tackifiers. Asia-Pacific leads with XX% of market value, supported by China's rosin-processing base and expanding adhesive, ink and rubber production across India and Southeast Asia. Product development is shifting toward stabilized, hydrogenated and light-color rosin esters that deliver higher thermal stability and enable substitution of petroleum-derived hydrocarbon resins.

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Executive summary

The global rosin resin market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Adhesives and sealants account for XX% of demand as packaging, hygiene, tapes, labels and construction formulations increase their use of renewable tackifiers. Asia-Pacific leads with XX% of market value, supported by China's rosin-processing base and expanding adhesive, ink and rubber production across India and Southeast Asia. Product development is shifting toward stabilized, hydrogenated and light-color rosin esters that deliver higher thermal stability and enable substitution of petroleum-derived hydrocarbon resins.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Worldwide rosin production totaled approximately XXX kilotonnes in 2025, according to Harima Chemicals Group.
- Asia-Pacific represented XX% of 2025 market value and will post the fastest regional CAGR of XX% through 2031.
- Rosin esters led the product mix with XX% of 2025 revenue and will expand at a XX% CAGR.
- Gum rosin supplied XX% of market value, reflecting the scale of pine-tapping and downstream conversion in China, Brazil and Indonesia.
- Adhesives and sealants accounted for XX% of demand, equivalent to USD XXX billion in 2025.
- Hydrogenated and stabilized grades will grow at XX% annually as formulators prioritize color retention, oxidation resistance and low-odor performance.
- The ten leading suppliers controlled XX% of global revenue in 2025, producing a moderately concentrated market with a long tail of regional Chinese, Brazilian and European processors.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Rosin Resin Market Trends and Growth Drivers

Rosin resin demand sits at the intersection of packaging growth, industrial formulation performance and the transition toward renewable carbon. Its commercial value comes from modifying tack, wetting, cohesion, gloss and film formation across adhesives, inks, coatings and elastomers, while its pine-derived origin gives formulators a direct route to increasing bio-based content.

The market's economics begin with two distinct feedstock systems. Gum rosin depends on tapping labor, pine productivity and rural collection networks, whereas tall oil rosin is tied to kraft-pulp output and refinery integration. Suppliers able to balance these sources, standardize resin-acid composition and maintain color consistency hold a structural advantage during feedstock cycles.

Growth is increasingly quality-led. Standard ester capacity remains competitive, but incremental value is migrating toward hydrogenated, stabilized, low-odor and certified products backed by application laboratories and customer-specific performance data.

Growth drivers

Hot-melt adhesive conversion accelerates tackifier demand

Packaging, hygiene, bookbinding and product-assembly converters are replacing solvent-borne systems with hot-melt and pressure-sensitive adhesives to raise line speeds and reduce volatile emissions. Rosin esters provide rapid wetting, polymer compatibility and tunable softening points, placing them at the center of EVA, SIS, SBS and metallocene-polyolefin formulations.

Renewable carbon becomes a purchasing criterion

Consumer-goods groups and adhesive formulators are incorporating renewable-carbon targets into supplier scorecards. Pine-derived rosin resins offer a commercially proven route to higher bio-based content without wholesale reformulation, supporting premium pricing for certified and life-cycle-assessed grades.

E-commerce and label growth expand pressure-sensitive applications

Parcel shipping, logistics automation and shorter packaged-goods product cycles are increasing demand for labels, tapes and case-sealing materials. These applications consume substantial volumes of rosin ester tackifiers and reward products that maintain adhesion across recycled board, films and low-surface-energy substrates.

Infrastructure spending supports road-marking binders

Expansion and maintenance of road networks are lifting consumption of thermoplastic markings, where modified rosin esters act as fast-drying binders with strong glass-bead retention. Demand is particularly strong in emerging Asian markets and in jurisdictions upgrading nighttime-visibility and road-safety standards.

Specialty rubber formulations favor resin-acid chemistry

Tire, footwear and industrial-rubber producers use disproportionated rosin, rosin soaps and modified resins as emulsifiers, tackifiers and processing aids. Higher tire production and demand for improved green-tack performance support consumption, particularly near Asian manufacturing clusters.

Hydrogenation unlocks premium applications

Hydrogenation and advanced stabilization reduce color development, odor and oxidative degradation in demanding formulations. These performance gains expand rosin resin use in premium hygiene adhesives, optical and electronic applications, automotive interiors and products requiring extended heat aging.

Restraints

Feedstock volatility compresses converter margins

Gum rosin supply depends on tapping economics, labor availability, weather and pine-forest productivity, while tall oil rosin availability is linked to kraft-pulp operating rates. Sharp feedstock movements create inventory losses and complicate price commitments for independent esterification and modification plants.

Sensitization classification raises compliance costs

Rosin and selected derivatives require disciplined hazard communication, exposure controls and formulation stewardship under major chemical regimes. Classification activity can lengthen qualification cycles and push sensitive end uses toward highly processed, hydrogenated or alternative tackifier systems.

Hydrocarbon resins defend price-sensitive formulations

C5, C9 and hydrogenated hydrocarbon resins offer controlled color, odor and compatibility across many adhesive polymers. When petroleum-resin pricing weakens, commodity rosin esters face substitution pressure in packaging and nonwoven applications where renewable content carries limited purchasing weight.

Untreated rosin has performance boundaries

Unmodified rosin can crystallize, oxidize and darken under heat or prolonged storage, restricting direct use in high-specification systems. Producers must invest in esterification, hydrogenation and stabilization capability, raising capital intensity and creating a widening margin gap between commodity and specialty grades.

Rosin Resin Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Hot-melt adhesive conversion accelerates tackifier demand	XXX	XXX	XXX
Renewable carbon becomes a purchasing criterion	XXX	XXX	XXX
E-commerce and label growth expand pressure-sensitive applications	XXX	XXX	XXX
Infrastructure spending supports road-marking binders	XXX	XXX	XXX
Specialty rubber formulations favor resin-acid chemistry	XXX	XXX	XXX
Hydrogenation unlocks premium applications	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Feedstock volatility compresses converter margins	XXX	XXX	XXX
Sensitization classification raises compliance costs	XXX	XXX	XXX
Hydrocarbon resins defend price-sensitive formulations	XXX	XXX	XXX
Untreated rosin has performance boundaries	XXX	XXX	XXX

Source: XXX

Rosin Resin Market Segmentation by Source, Product and Application

By Source Type

Gum rosin dominates through the scale of Chinese, Brazilian and Indonesian pine-tapping supply and its broad suitability for esterification and modification. Tall oil rosin gains share because it valorizes a kraft-pulp coproduct and offers multinational buyers a traceable, non-food renewable feedstock. Wood rosin remains a smaller but established North American source with dependable performance in selected industrial formulations.

Value by source Type, USD bn

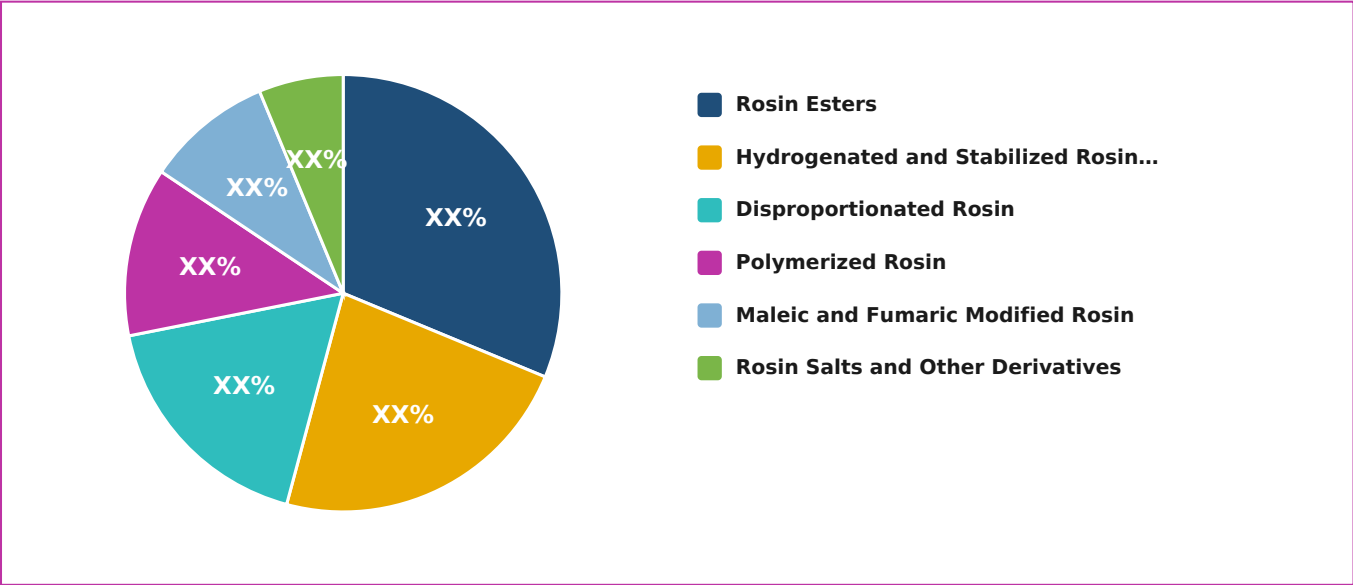
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Gum Rosin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tall Oil Rosin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wood Rosin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Product Type

Rosin esters lead because glycerol- and pentaerythritol-based products deliver the softening point, compatibility and tack required in modern adhesives and coatings. Hydrogenated and stabilized resins will grow fastest as customers demand lighter color, reduced odor and improved heat aging. Disproportionated and polymerized grades retain important niches in rubber, emulsification, soldering flux and high-cohesion formulations.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

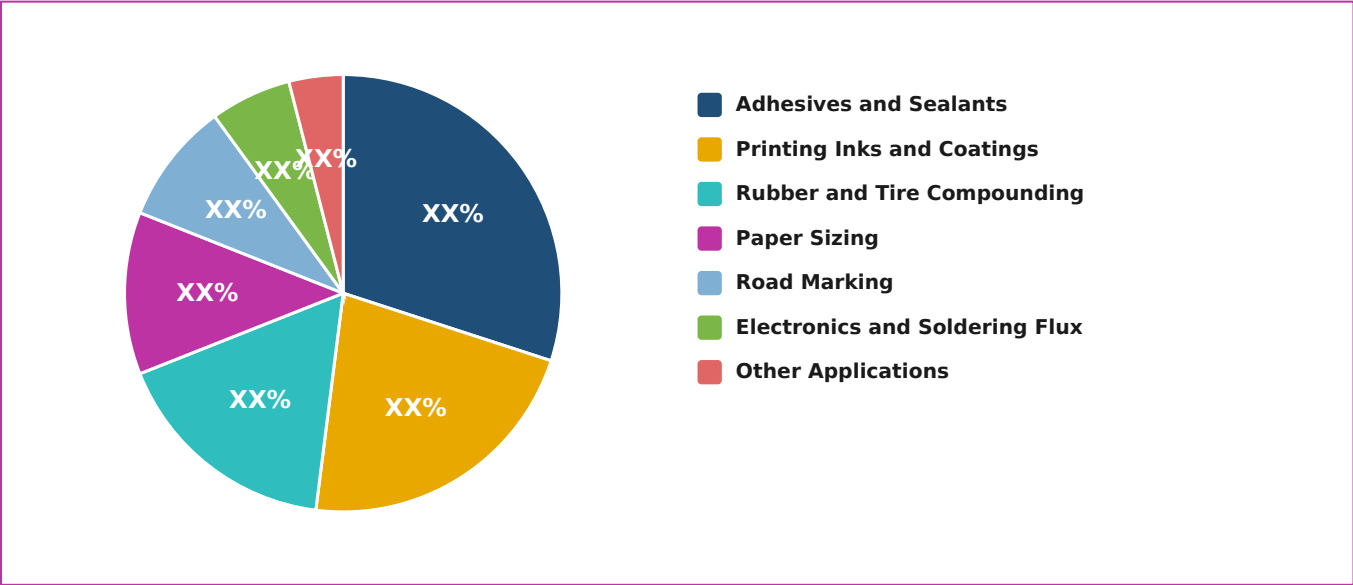
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Rosin Esters	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Hydrogenated and Stabilized Rosin Resins	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Disproportionated Rosin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Polymerized Rosin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Maleic and Fumaric Modified Rosin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Rosin Salts and Other Derivatives	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Adhesives and sealants lead because rosin resins provide tack, wetting and compatibility across packaging, hygiene, tapes, labels, footwear and construction systems. Printing inks and coatings remain substantial outlets, although digitalization restrains publication-ink demand while packaging inks continue to expand. Electronics and road-marking applications post the fastest gains through requirements for high-purity fluxes, rapid-setting binders and durable glass-bead adhesion.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Adhesives and Sealants	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Printing Inks and Coatings	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Rubber and Tire Compounding	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Paper Sizing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Road Marking	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Electronics and Soldering Flux	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Grade

Industrial grades serve the broad adhesive, ink, rubber and paper markets where cost-performance balance is decisive. Premium light-color and high-stability products gain share in hygiene, automotive, electronics and transparent adhesive systems. Food-contact and highly purified grades form a smaller segment but command attractive margins because qualification, migration and consistency requirements create high switching costs.

Value by grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Industrial Standard Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Light-Color and High-Stability Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food-Contact and High-Purity Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

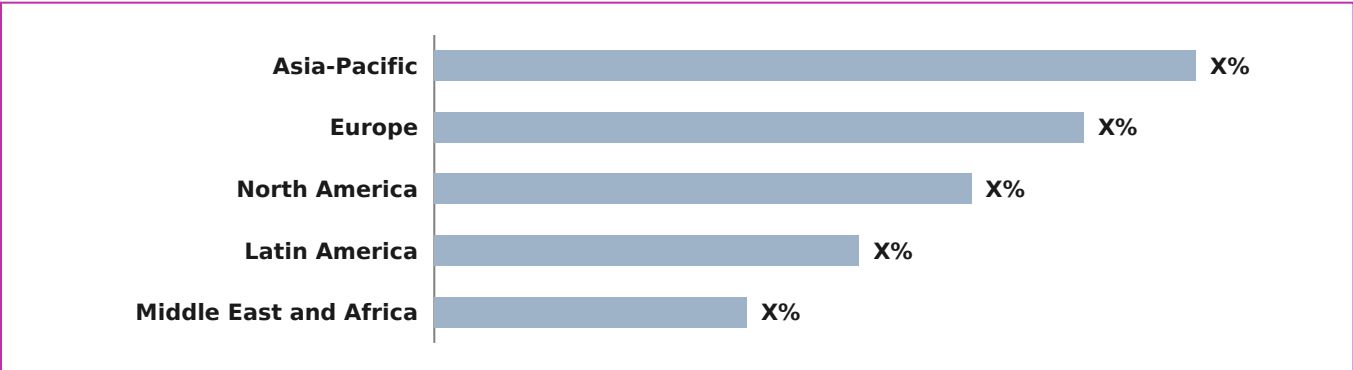
Rosin Resin Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global revenue in 2025 and remains the central production, conversion and consumption hub. China combines a large gum-rosin supply chain with extensive adhesive, ink, rubber and road-marking manufacturing, while Japan concentrates on highly stabilized and application-specific derivatives. India, Vietnam and Thailand are gaining share as packaging, footwear, tire and infrastructure activity expands and buyers diversify supply beyond coastal China.

Europe holds XX% of market value and has the strongest commercial pull for certified renewable-carbon products, low-odor grades and documented chemical compliance. France, Finland, Sweden and Portugal connect pulp-industry or pine-derived feedstocks with sophisticated resin conversion, while Germany and Italy provide major downstream demand in adhesives, inks, automotive materials and road markings. Regional growth of XX% is value-led, with specialty grades offsetting mature underlying volume.

North America accounts for XX% of revenue, supported by crude tall oil integration, packaging adhesives, hygiene products and construction applications. Latin America will advance at XX%, led by Brazil's planted pine resources and local conversion expertise, while the Middle East and Africa develop from a smaller base through packaging, construction and tire demand. Brazil is positioned as both an export platform and a strategic alternative source of gum rosin.

Growth rate by region, 2025-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Rosin Resin Market Competitive Landscape and Company Share

The market is moderately concentrated: the ten leading suppliers captured XX% of 2025 revenue, while numerous Chinese and regional processors compete in gum rosin esters and standard modified grades. Kraton, DRT, Harima Chemicals, Arakawa Chemical Industries and Lawter combine feedstock access, modification technology, global sales coverage and application laboratories, creating defensible positions in premium tackifiers and specialty derivatives.

Competition is moving away from nominal softening point and color specifications toward application performance, renewable-carbon documentation, odor control, oxidative stability and security of supply. Integrated players leverage crude tall oil refining or established gum-rosin procurement networks, while specialist converters differentiate through flexible batch sizes, tailored esterification and customer-specific adhesive or ink testing.

Recent investment centers on hydrogenated capacity, certified supply chains and higher-performance adhesive tackifiers. DRT developed a new hydrogenated rosin and derivative facility in France, Harima expanded certified tall-oil supply-chain coverage, and Kraton has promoted advanced light-color rosin ester technology in collaborative packaging adhesive systems. Acquisitions and alliances will increasingly target regional feedstock access, formulation know-how and qualified production assets.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Kraton Corporation	XXX	XXX	XXX	XXX
DRT	XXX	XXX	XXX	XXX
Harima Chemicals Group	XXX	XXX	XXX	XXX
Arakawa Chemical Industries	XXX	XXX	XXX	XXX
Lawter	XXX	XXX	XXX	XXX
Eastman Chemical Company	XXX	XXX	XXX	XXX
Ingevity Corporation	XXX	XXX	XXX	XXX
Foreverest Resources	XXX	XXX	XXX	XXX
Guangdong KOMO	XXX	XXX	XXX	XXX
Respol Resinas	XXX	XXX	XXX	XXX

Source: XXX

Rosin Resin Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2025 and 2031. Volume growth will remain steady, but mix improvement will contribute disproportionately as hydrogenated, stabilized and certified grades displace standard resins in premium adhesives, electronics, automotive and food-contact applications.

The central forecast assumes stable pulp-industry coproduct availability, continued packaging and label growth, and progressive renewable-carbon adoption. Stronger fossil-resin price competition would slow substitution in commodity adhesives, while accelerated brand-owner carbon targets and infrastructure programs would lift demand above the base case.

Winning suppliers will integrate feedstock risk management with application development. Long-term contracts, multiple pine-resource origins, mass-balance certification, local technical service and product platforms spanning gum-, tall-oil- and wood-rosin chemistry will deliver the strongest combination of growth, customer retention and margin resilience.

Opportunities

- Certified bio-based tackifiers for recyclable packaging adhesives
- High-purity rosin derivatives for electronics soldering flux
- Heat-resistant resins for automotive interiors and durable labels
- Rosin ester binders for thermoplastic road markings
- Regional conversion capacity in India, Southeast Asia and Brazil
- Low-carbon mass-balance products based on pulp-industry coproducts

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