

## I Production and market information

### I-1 Pine resources & oleoresin situation

#### I-1.1 Pine resources and oleoresin storage in china

##### I-1.1.2 Current oleoresin storage

The total oleoresin storage is estimated based on the annual collection volume of oleoresin of single-strain pine which is determined by the average value of oleoresin output from various pine species in actual production. According to the investigation and study of Dong Jingxi, a senior engineer of Yunnan Forest Inventory and Planning Institute that is responsible for the technical management and part of administrative management of Yunnan's forest resources, the annual oleoresin collection volume of single-strain PM, PY and PKVL is 100, 100 and 100 kg/a separately in China.

Table I-1.1.2 -1 Oleoresin storage calculation of tapping pine over the country

Province	Species	For the whole pine forest			For the timber pine forest		
		Trees (DBH> 20cm), '000 stains	Oleoresin storage, t	Percentage (%)	Trees (DBH> 20cm), '000 stains	Oleoresin storage, t	Percentage (%)
Yunnan	PY, PKVL	100	100	100	100	100	100
Fujian	PM	100	100	100	100	100	100
Sichuan	PM, PY	100	100	100	100	100	100
Guangxi	PM, PY	100	100	100	100	100	100
Tibet	PY	100	100	100	100	100	100
Guangdong	PM	100	100	100	100	100	100
Hunan	PM	100	100	100	100	100	100
Zhejiang	PM	100	100	100	100	100	100
Hubei	PM	100	100	100	100	100	100
Jiangxi	PM	100	100	100	100	100	100
Chongqing	PM	100	100	100	100	100	100
Guizhou	PM, PY	100	100	100	100	100	100
Anhui	PM	100	100	100	100	100	100
Henan	PM	100	100	100	100	100	100
Jiangsu	PM	100	100	100	100	100	100
Shaanxi	PM	100	100	100	100	100	100
Hainan	PM	100	100	100	100	100	100
<b>Total</b>		<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: Scientia silvae sinicae/CCM International

Table 1-3.4.1-1 Number of manufacturers, dealers and derivative plants of gum rosin in China

Region	Province	Manufacturer				Dealer				End user			
		2002	2004	2006	2008	2002	2004	2006	2008	2002	2004	2006	2008
Northwest China	Ningxia	0	0	0	0								0
	Gansu	0	0	0	0	0	0						
	Xinjiang	0	0	0	0								
	Shaanxi	0											
	<b>Subtotal</b>	<b>0</b>											
Southwest China	Yunnan												0
	Sichuan												
	Guizhou												
	Chongqing												
	<b>Subtotal</b>												
Central China	Jiangxi												
	Hunan												
	Hubei												
	Henan		0										
	Anhui												
	<b>Subtotal</b>												
North China	Shanxi		0		0								
	Hebei	0	0	0	0								
	Beijing	0	0	0	0							0	
	Tianjin		0	0	0								
	Inner Mongolia	0	0	0	0	0	0	0			0	0	0
	<b>Subtotal</b>		<b>0</b>		<b>0</b>								
Northeast	Liaoning	0	0	0	0								
	Jilin	0	0	0	0				0			0	0
	Heilongjiang	0	0	0	0								0
	<b>Subtotal</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>								
East China	Jiangsu		0	0	0								
	Shandong		0	0	0								
	Shanghai		0	0	0								
	Zhejiang												
	Fujian												
	<b>Subtotal</b>												
South China	Guangdong												
	Guangxi												
	Hainan											0	
	<b>Subtotal</b>												
	<b>Total</b>												

Source: Rosin-China/CCM International

## I-4 Price of gum rosin

### I-4.2 Price in the past few years

Usually the price change of gum rosin is periodic.

Table I-4.2-1 Lowest prices of gum rosin (1st grade) in each month, 2000~May 2010 (USD/t)

Year	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2000	■	■	■	■	■	■	■	■	■	■	■	■
2001	■	■	■	■	■	■	■	■	■	■	■	■
2002	■	■	■	■	■	■	■	■	■	■	■	■
2003	■	■	■	■	■	■	■	■	■	■	■	■
2004	■	■	■	■	■	■	■	■	■	■	■	■
2005	■	■	■	■	■	■	■	■	■	■	■	■
2006	■	■	■	■	■	■	■	■	■	■	■	■
2007	■	■	■	■	■	■	■	■	■	■	■	■
2008	■	■	■	■	■	■	■	■	■	■	■	■
2009	■	■	■	■	■	■	■	■	■	■	■	■
2010	■	■	■	■	■							

Source: CCM International

Table I-4.2-2 Highest prices of gum rosin (1st grade) in each month, 2000~May 2010 (USD/t)

Year	Jan.	Feb.	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2000	■	■	■	■	■	■	■	■	■	■	■	■
2001	■	■	■	■	■	■	■	■	■	■	■	■
2002	■	■	■	■	■	■	■	■	■	■	■	■
2003	■	■	■	■	■	■	■	■	■	■	■	■
2004	■	■	■	■	■	■	■	■	■	■	■	■
2005	■	■	■	■	■	■	■	■	■	■	■	■
2006	■	■	■	■	■	■	■	■	■	■	■	■
2007	■	■	■	■	■	■	■	■	■	■	■	■
2008	■	■	■	■	■	■	■	■	■	■	■	■
2009	■	■	■	■	■	■	■	■	■	■	■	■
2010	■	■	■	■	■							

Source: CCM International

## I-5 Export & import situation of gum rosin and its derivatives

### I-5.2 Export & import analysis in 2007~2009

#### ➤ Export analysis

Since the export tender & quota system for gum rosin was cancelled in 2002, the export quantity of gum rosin has little relationship with the quota after 2002. Owing to global economic depression, the export quantity of gum rosin hit the bottom at the beginning of 2009, but it has quickly recovered in H2 2009, both in quantity and price thanks to the recovery of global economy.....

Table I-5.2-2 Average export price of gum rosin in China, 2007~2009

Date	2009		2008		2007	
	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg
January						
February						
March						
April						
May						
June						
July						
August						
September						
October						
November						
December						
<b>Total</b>						

Source: CCM International

## I-6 Consumption pattern of gum rosin in china in 2007~2009

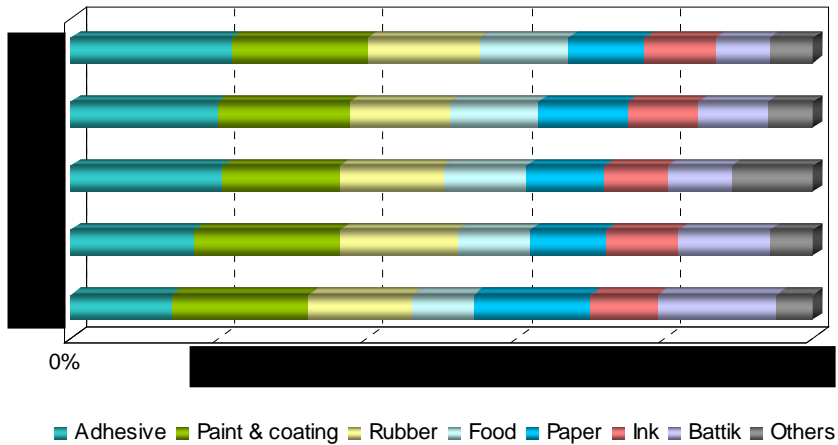
Table I-6.1-2 Market size and market share of gum rosin by value, 2007~2009

Year	2007		2008		2009	
	Market size (million USD)	Market share	Market size (million USD)	Market share	Market size (million USD)	Market share
Adhesive						
Paint & coating						
Rubber						
Food						
Paper						
Ink						
Batik						
Others						
<b>Total</b>						

Source: CCM International

The gum rosin consumption share in adhesive, paint & coating, rubber, food and ink industry has been expanding rapidly from 2007 to 2009 because of the fast development of these industries in China .....

Figure I-6.1-2 Consumption pattern of gum rosin in China, 2005~2009



Source: CCM International