

# Brazilian Gum Rosin

A sustainable and renewable raw material



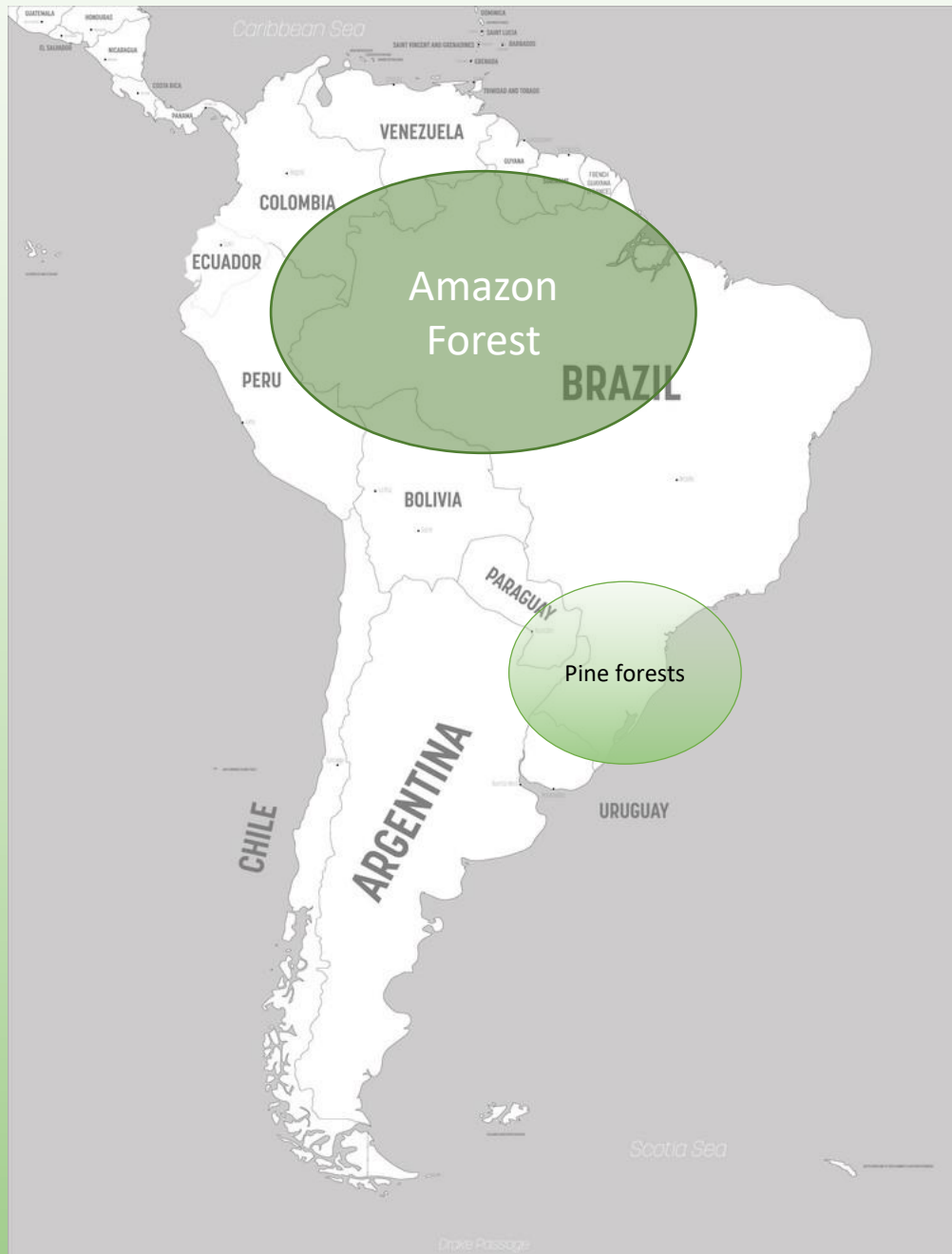
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# **Agenda:**

- Pine forests location in Brazil
- Brazil data
- Brazil sustainability
- Historical export data
- Covid-19 impacts
- Current Market situation
- Conclusion



## **Pine forest Locations**

# **BRAZIL DATA**

**Total surface : 850 million Hectares**

**30 million Hectares = Cities and infrastructure – 3%**

**77 million Hectares = Agriculture and planted forests – 9%**

**68 million Hectares = Natural pastures – 8%**

**112 million Hectares = Planted pastures – 13%**

**117 million Hectares = Indigenous lands – 14%**

**446 million Hectares = Preserved land – 53%**

# **Planted Pine Forests**

**Total surface 1.6 million Hectares**

**Cellulose and Paper**

**Timber and Lumber**

**Pine oleoresin production = 80,000 Hectares**

**1 Hectare = 10,000 M2 = 2.471 acres**

# Tapped Pine Species in Brazil

Pinus elliottii



Tropical pine species:



Pinus Caribaea var. caribaea

Pinus Caribaea var. hondurensis

Pinus Caribaea var. bahamensis

Pinus Oocarpa

# Pine History in Brazil

1970's – Deployment of forests

1980's – Pine tapping begins + Start of genetic pine tree selection

1990's – Brazil consolidates itself as a player in the international Market

2000's – Brazil overtakes Indonesia as the second largest GR producer

2014 – 2019 – Brazil doubled its production in a sustainable way

2020 – Today Brazil is the largest GR exporter worldwide

# Building Sustainability



**Planted forests**

**High planting density**

**Genetic selection – pine oleoresin yield + timber**

**Fast growth**

**Stimulant use**



# **Natural**      **x**      **Planted Forest**

**Low Planting density**

**Natural genetic selection**

**Slow growth**

**Tapping starts after 15 years**

**Tapping activity < 5 years**

**No stimulant**

**Renewable but not sustainable**

**Ex: CHINA**

**High Planting density 1.100 trees/Ha**

**Genetic selection**

**Fast growth**

**Tapping starts after 8 years**

**Tapping activity > 12 years**

**Stimulant use**

**Renewable and sustainable**

**Ex: Brazil, Argentina**

# CHINA

## Pine Oleoresin production

2014 = 821,000 MT

2019 = 507,000 MT - **38%**



# BRAZIL

## Pine Oleoresin production

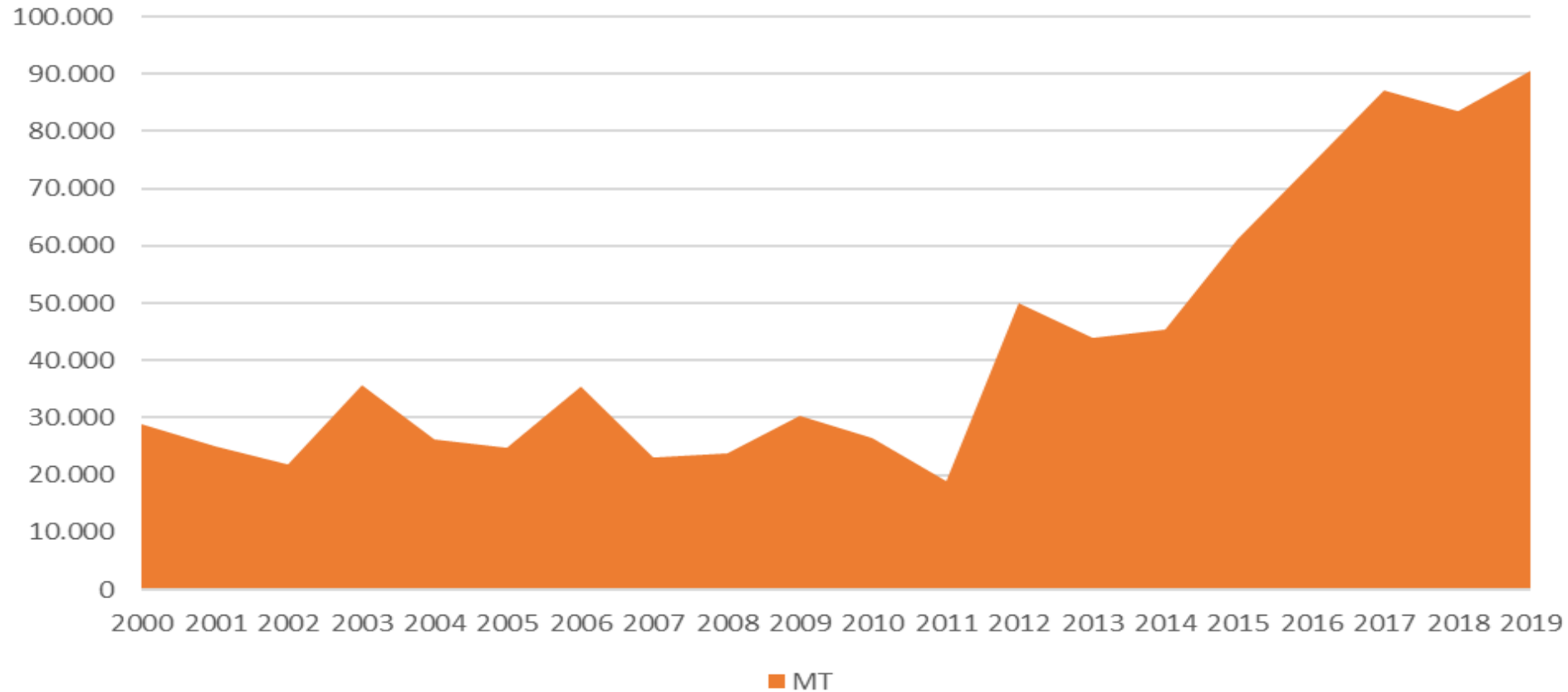
2014 = 110,000 MT

2019 = 220,000 MT + **100%**

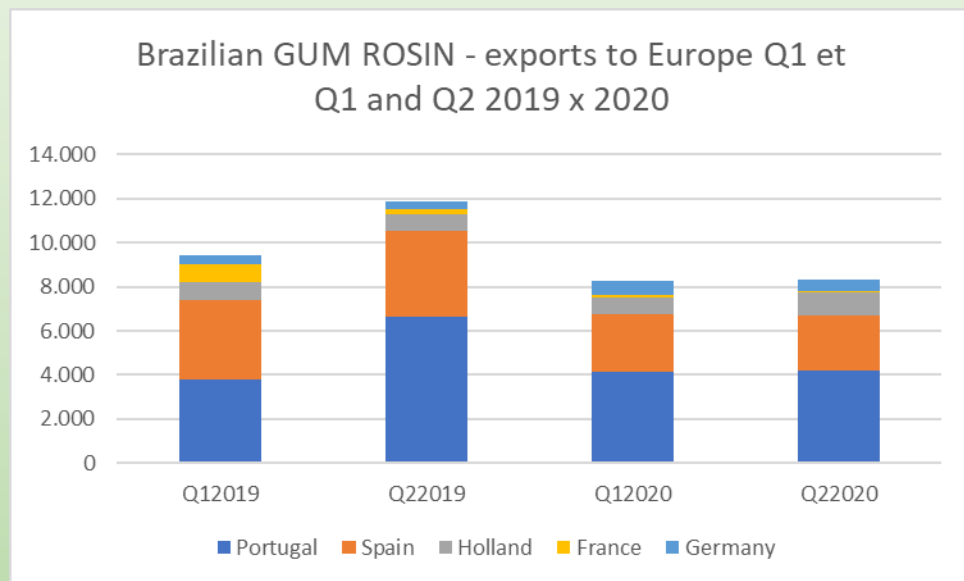


# BRAZILIAN SUSTAINABILITY has ensured solid growth

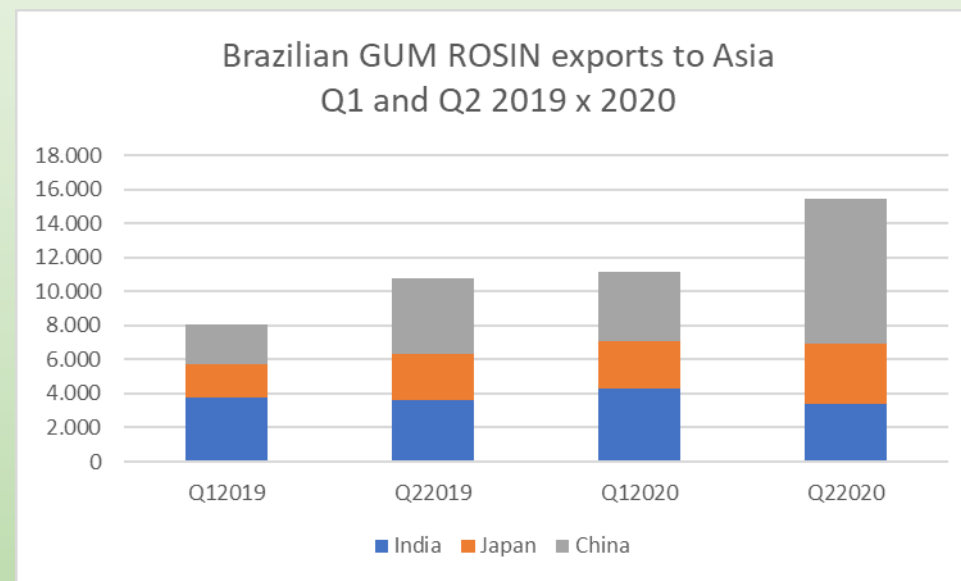
## Brazil - GUM ROSIN EXPORTS 2000 - 2019



# COVID-19 Impact on BR GR Exports



**Brazil GR to Europe :**  
**S1 2019 = 21,314 MT**  
**S1 2020 = 16,594 MT**  
**- 22 %**



**Brazil GR to Asia**  
**S1 2019 = 18,836 MT**  
**S2 2020 = 26,595 MT**  
**+ 41%**



# **What's next ?**

**Who will remain competitive in the GUM ROSIN Market?**

**Those who will be able to combine :**

**Planted Forests**

**High density**

**FSC certification**

**Better pine oleoresin yields**

**Fast-growing trees**

**More effective Stimulants**

**Tapping automation**

**BRAZIL is ready to continue growing in the  
GUM ROSIN Market in a sustainable way**

**Buy Brazilian Gum Rosin**

**Buy sustainability**

**Buy environmental protection**

**Buy social responsibility**

**Buy quality**

**Buy forest certifications**

Thank you

謝謝

ありがとうございました

Merci beaucoup

Vielen Dank

Grazie mille

Muchas Gracias

Muito obrigado

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