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# Resinagem na Espanha



**Alvaro Picardo Nieto**

Consejería de Fomento y Medio Ambiente  
Junta de Castilla y León (Espanha)



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## 2.- Sectoral characterization

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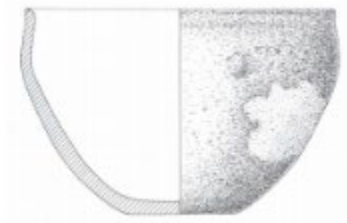
## 4.- Conclusions

# Resin tappers from the Bronze Age:

3.500 years ago



A pre-historical activity in Navas de Oro  
(Segovia) (R.Martín Vela et al., 2019)



2

# Modern industrial activity since 1843

Hontoria del Pinar (Burgos).

First industrial plant in Spain, dated 1843



Forest administration **regulated it since 1880**

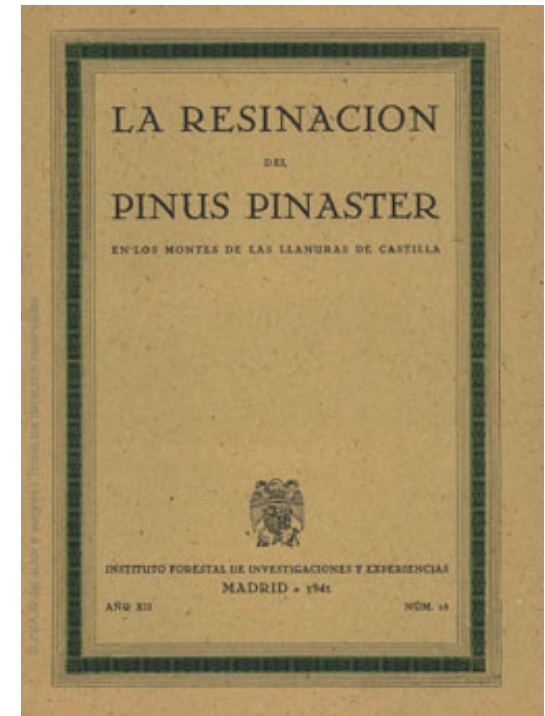
The main private company,  
the national reference co.,

***La Unión Resinera Española*** was  
**founded in 1903**



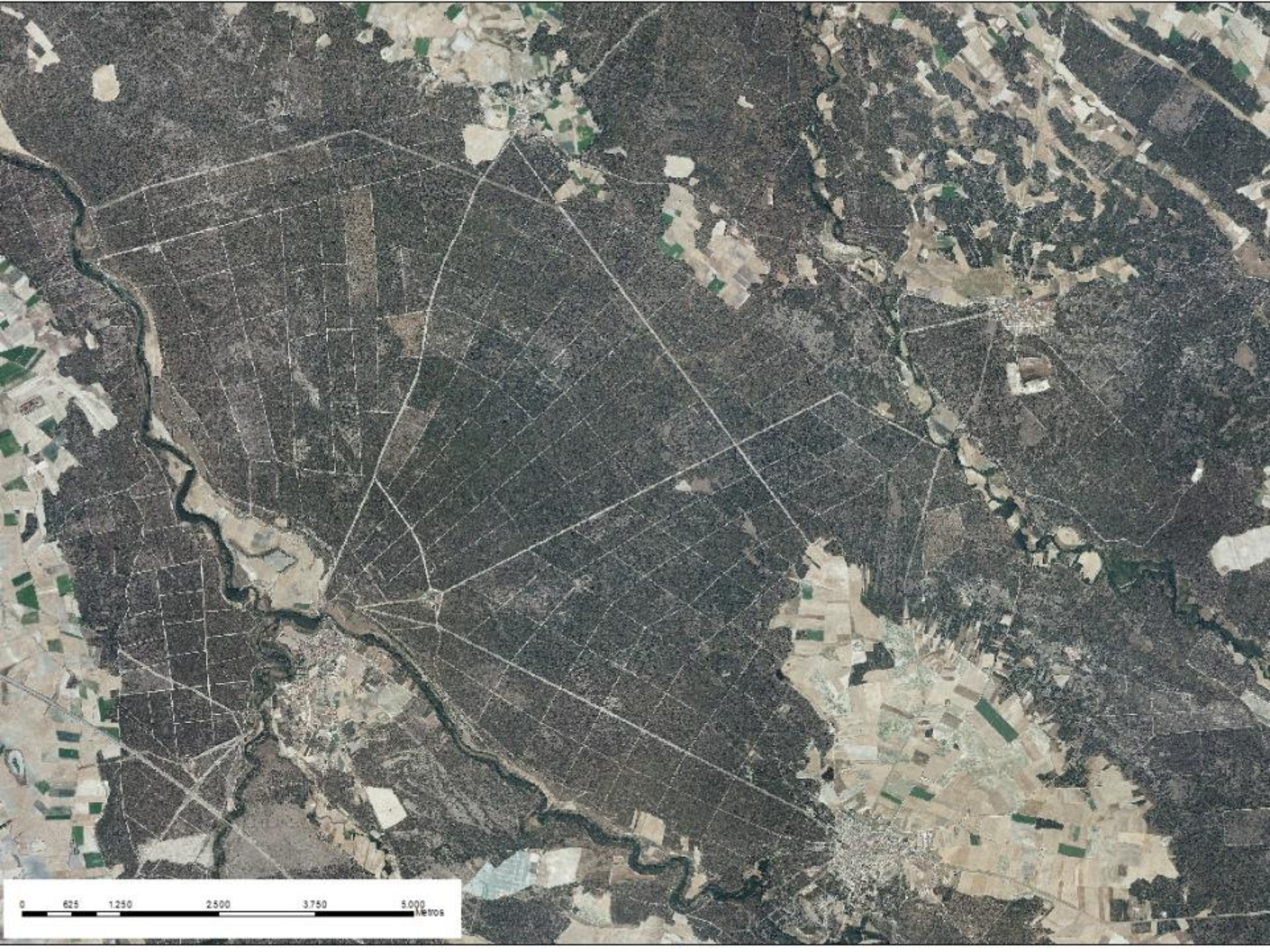
# Sustainable Forest Management

*planning since 1900*

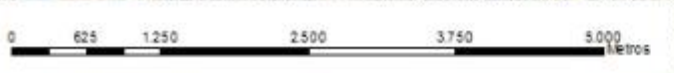
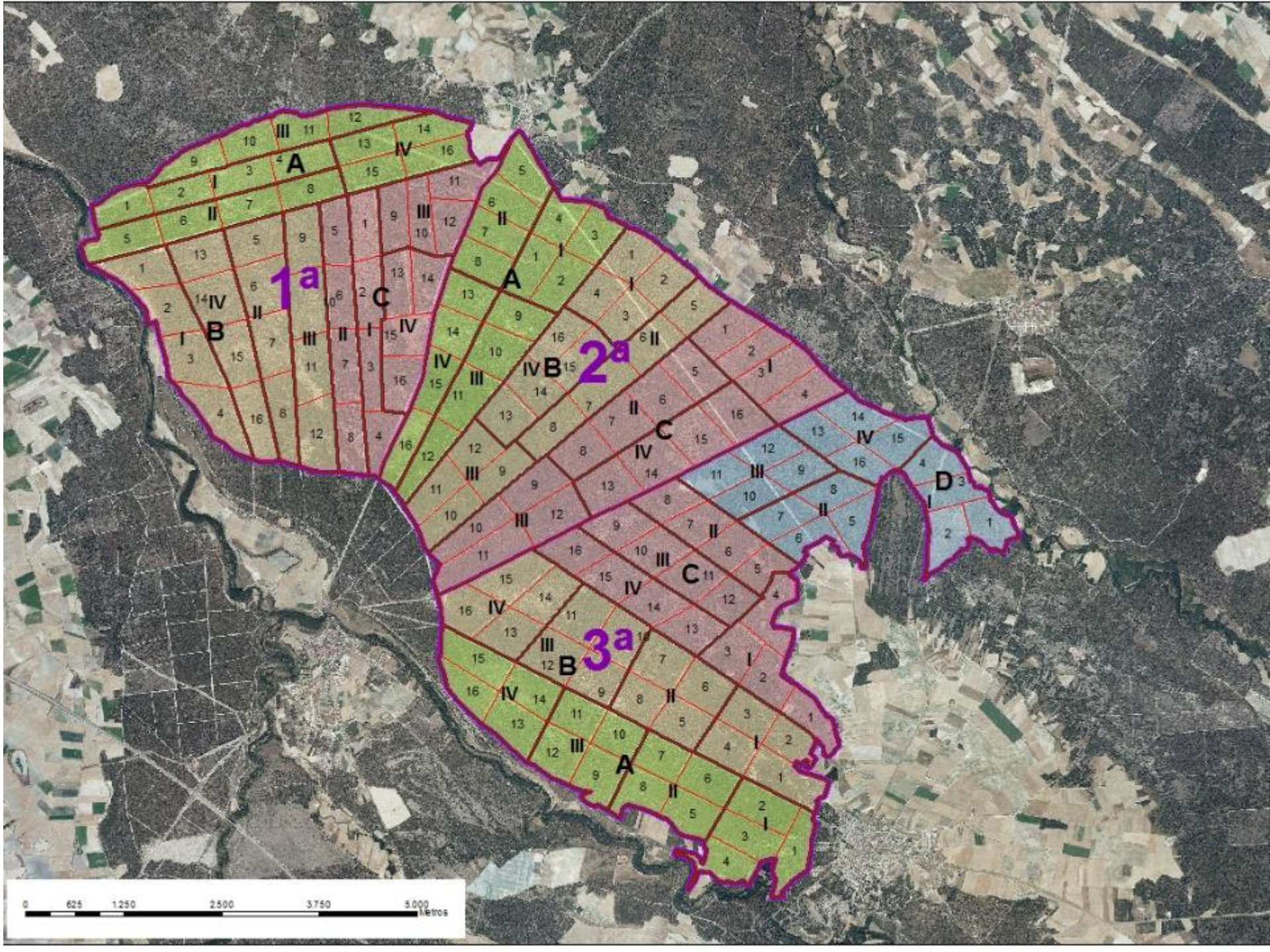


National research priority since 1930

[http://libros.inia.es/libros/product\\_info.php?products\\_id=708](http://libros.inia.es/libros/product_info.php?products_id=708)



0 625 1250 2500 3750 5000  
Metros



**Maximum production in 1962, *under heavy import tariffs,***



**60.000 tonnes/year  
600.000 hectares  
5.000 resin tappers**

**FOTO MUJER**

**A cultural landscape developed during the XX century** <sup>8</sup>

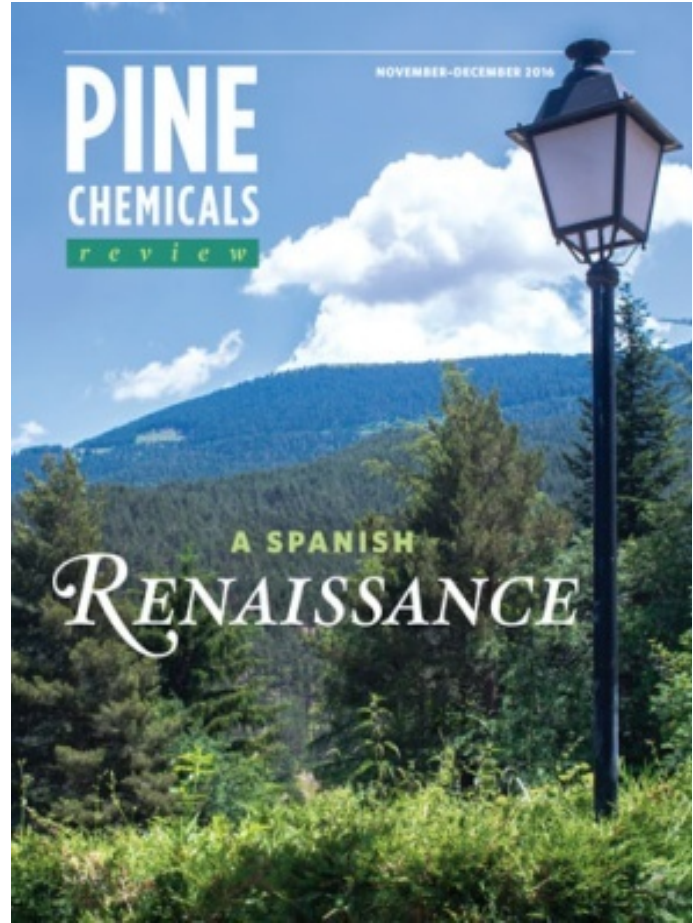


The activity almost disappeared in the '80s,

due to lower prices of chinese products



And it recovered in 2011 !



# Sectoral characterization



*Strong contrast among flat land pine forests*

Pine Forests in sandy soils in the plateau south of Duero river, in Segovia

*... and mountain pine forests*



Pine forest in Tietar Valley (Avila), with the Gredos Range in the background

## 1.-The facts

From 2011 to 2021:

- less than 2,000 to almost **12,000 Tm/yr yield**
- less than 100 to more than **1,000 workers**
- 300,000 to **3,200,000 tapped pines**
- < 20,000 to > **120.000 hectares** of managed pine forests for resin
- 4 to **7 industrial plants**

## 2.-Characteristics

### 1.-Business model:

Private initiative

No integration of activities

Strong and detailed regional Control & Regulation

Weak and soft sectoral organizations

### 2.-Forests:

Natural pine forests of *Pinus pinaster*

40 to 100 years rotation

Mostly public

Multifunctional: *biodiversity, public use & timber*

Low productivity: 100 kg/ha/year

High forest fire risk

## 2.-Characteristics

### 3.-Resin tappers

Individuals / Few cooperatives

Full time 8 months workers or partial dedication

Sign contracts with pine forest holders to get the right  
of tapping pines (0'40 €/tree or around 50 €/ha or  
1500-2000 €/year)

Sell their harvest to industry (1,00 €/kg)

Recognized agricultural workers since 2014

### 4.-Industry

Small and Medium Enterprises (SME)

Resin distillation plus second derivatives: *No timber*

## 2.-Characteristics

### 5.-Market

National & European

One price for the entire year

**PEFC** certified production

Incipient innovation



### 6.-Activity

6 producing months

2 months preparing the pines

Acid stimulation

Socially oriented, *to provide employment in*

*depopulated rural areas (10- 20 inhabitants/km<sup>2</sup>)*

*and to prevent forest fires*



**The most common system**

*although innovation is  
being attempted*







*and expectations  
are posed in the  
Borehole System*

### 3.- Key explaining factors

1.-A minimum activity had been maintained since the '80s, to preserve the know-how

[http://www.premioconama.org/premios11/premios/proyectos\\_popup.php?id=46](http://www.premioconama.org/premios11/premios/proyectos_popup.php?id=46)

2.-**New industrial interest,**

following the rosin market crisis of 2008-2010,  
due to Chinese production break down

**Resinas Naturales built a new plant in Cuéllar (Sg) in 2011**

[http://www.eladelantado.com/segovia/resineros\\_de\\_vuelta\\_al\\_pinar/](http://www.eladelantado.com/segovia/resineros_de_vuelta_al_pinar/)

3.-**High unemployment** levels due to the economic crisis of 2008

4.-**Already managed public forests available**

5.-**Political commitment in Junta de Castilla y León**

## 4.-Threats and uncertainties

1.-The **health status** of pine forests  
(decay and nematode)

2.-Forest fires

3.-Forest **species composition**  
**change**, *due to climate change*

4.-Changes in prices

5.-Socioeconomical

**unsustainability**



## 5.-Opportunities

The **United Nations** claim for provides  
*a new global context*

The European bid on

## Bioeconomy & The Green Deal

offers new opportunities for



EUROPEAN UNION

**Natural  
Renewable  
Materials**



There will be **increasing demand of biobased products** like natural resin



## **SUSTAINABILITY**

Resin plants are  
**biorrefineries**

Using resources from  
*natural forests*  
with *protected hábitats*

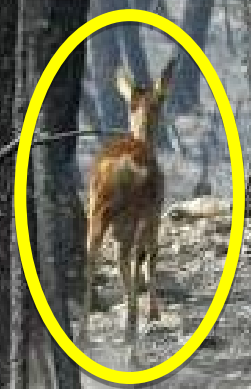


European Commission has recognized some of these pine forests like  
**Community Interest Habitats**, in category 9540  
**“Pinares mediterráneos de pinos mesogeanos endémicos”**

See: <http://www.irmase.csic.es/users/interbos/Resultados/Publicaciones/9540.pdf>



**Preventing *forest fires*,  
contributing to *climate change* mitigation**



**Providing employment  
and economic activity in *rural areas*,  
contributing to *territorial cohesion*  
in *depopulated areas***





## The European Commission is funding several innovation projects



<https://sust-forest.eu/es>



<https://www.incredibleforest.net/es>

### That are helping us to:

- ✓ Establish innovation networks
- ✓ Promote regional collaboration
- ✓ Define needed actions &
- ✓ Agree on a roadmap

Since 2013:

1. **Resipinus**, in Portugal, and the **Resin Roundtable for Castilla y León**, in Spain, have consolidated their action
2. In Spain, **PASSFOR**, a national program (2014) to develop the **forest sector**, includes a program on the resin sector
3. The **labour and fiscal regime for resin workers in Spain** has been improved
4. Resin activities are being incorporated in **Rural Development Programs (RDP)** in Spain and Portugal
5. A **Territorial Strategy for Resin** is being prepared: **Proenca-Nova Declaration**.

<https://www.resipinus.pt/>

<https://www.resinacyl.es/contenido/la-mesa-la-resina-castilla-leon>



**incredible**

Innovation Networks for Cork, Resins & Edibles  
in the Mediterranean basin

#NWFPpolicy  
www.incredibleforest.net

**Policy Forum “Untapping the potential of  
non-wood forest products for Europe's  
green economy”**

**16<sup>th</sup> - 17<sup>th</sup> March 2021**  
Online event

In **March 2021**, the **Policy Forum** brought together  
**250 people** from more than **33 countries** from

- ✓ International organizations,
- ✓ national and subnational administrations
- ✓ Academia and research institutes
- ✓ enterprises and sectoral organizations

*to reflect on **policy actions needed**  
**for resin and other NWFP***



The **Policy Forum** was a **call for action** addressing:

- ✓ **International organizations**, like FAO, WTO, UNFoF, Forest Europe
- ✓ **European institutions** (Commission, Council, Parliament and CoR)
- ✓ **National and subnational governments**
- ✓ **Sectoral organizations**, like PCA, HARPPA, CEPF, EUSTAFOR, FTP



## *Manifiesto of Alghero*

A commitment to promote the contribution of non-wood forest products to inclusive and green growth and eco-social progress in Europe and worldwide



**Non-wood forest products  
for people, nature and  
the green economy.  
Recommendations for  
policy priorities in Europe**

**A white paper based on  
lessons learned from  
around the Mediterranean**

Inazio Martínez de Arano,  
Sara Maltoni,  
Alvaro Picardo,  
Sven Mutke

*Published by*  
The European Forest Institute  
and the Food and Agriculture  
Organization of the United Nations

# Key policy actions . . . *for resin*

- 1. Securing conservation and supply of resin**
- 2. Building competitive and equitable resin value chains**
- 3. Transparency, data and information flow on resins**
- 4. Enabling conditions**

***Common actions at any territorial level***

# 1. Securing the conservation and sustainable supply of resin

## 1. Enhance the resource base

- Tackle the problem of private forest fragmentation and prevent forest fires
- Integrate management for both resin and wood
- Genetic improvement

## 2. Ensure sustainable harvest levels and fair secure access to the resource

- Train resin workers
- Develop Forest Advisory Services

## 3. Set up and improve monitoring systems and inventories

- Monitoring systems: Permanent research plots

## 2. Building competitive and equitable value chains

### 1. Develop innovative and territorial value chains

- Integrate activities of resin tapping and forest fire prevention
- Promote voluntary certification and labelling standards
- National Standard Contracts for resin commercialization

### 2. Innovative fiscal and labour regimes

- Clarify and characterize the two types of resin holdings: forests and tappers

### 3. Equitability and the role of producer organizations

- Increase transparency of price setting and price observatories
- Stimulate, strengthen and involve producers organizations: IBOs



# 3. Transparency, data and information flow on resins

## 1. Improve visibility of NWFPs

- Create a EU list of NWFP, including resin & resin products
- Improve codification & standardization: codes and chemical descriptors for resin and resin products
- Improve and integrate national statistics on resin production and trade

## 2. Traceability and innovative labelling

- Incorporate EU Ecolabels and biobased products certification

## 3. Facilitate access to data on production, collection and trade

- Incorporate resin forests to FISE. Include costs and benefit analysis of resin holdings in the new Farm&Forests Sust.Data Network

## 4. Enabling conditions

### 1. Coherence of institutional action

- EU Program for Resin and resin products, including CTO
- Consider REACH regulation's implications for resin products producers
- Reconsider the consideration of Talloil as fuel for bioenergy

### 2. Improve financial support

- Incorporate resin activities on Rural Development Programs

### 3. Foster innovation, knowledge transfer and extension capacity

- Mechanization of resin activities

# List of actions for resin

1. Tackle the problem of private forest fragmentation and prevent forest fires
2. Integrate management for both resin and wood
3. Genetic improvement
4. Train resin workers
5. Develop Forest Advisory Services
6. Monitoring systems: Permanent research plots
7. Integrate activities of resin tapping and forest fire prevention
8. Promote voluntary certification and labelling standards
9. National Standard Contracts for resin commercialization
10. Clarify and characterize the two types of resin holdings: forests and tappers
11. Increase transparency of price setting and price observatories
12. Stimulate, strengthen and involve producers organizations: IBOs
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17. Incorporate resin forests to FISE. Include costs and benefit analysis of resin holdings in the new Farm&Forests Sust.Data Network
18. EU Program for Resin and resin products, including CTO
19. Consider REACH regulation's implications for resin products producers
20. Reconsider the consideration of TalIOil as fuel for bioenergy
21. Incorporate resin activities to Rural Development Programs
22. Mechanization of resin activities

# There is a need for action at the European level

1. Create a EU list of NWFP, including resin & resin products
2. EU Program for Resin and resin products, including CTO & CST
3. Improve and integrate national statistics on resin production and trade
4. Improve codification & standardization: codes and chemical descriptors for resin and resin products
5. Incorporate resin forests to FISE. Include costs and benefit analysis of resin holdings in the new Farm&Forests Sust.Data Network
6. Reconsider the consideration of TallOil as fuel for bioenergy
7. Reconsider REACH regulation's implications for resin products producers
8. Incorporate EU Ecolabels and Biobased products Certification

And also at national and regional levels

and from *sectoral organizations* and enterprises:

***A common front is needed from enterprises and sectoral organizations to position Oleo Pine Resins as interesting Raw Materials for European Bioeconomy***

## 6.-Conclussions

We need to **strengthen cooperation**,  
at 3 levels

### 1.-Professional:

Incentives to resin **cooperatives**

### 2.-Sectorial:

**Forest biomass production  
and silvicultural treatments**

Creation of an **Resin Interprofessional Organization**

*that could improve contract types*

### 3.-Territorial:

The “**European Network of Resin Territories**”



# Resina

en Castilla y León



<https://www.cesefor.com/>



LA RESINA NATURAL EL SECTOR RESINERO EL MERCADO INNOVACIÓN DOCUMENTACIÓN HERRAMIENTAS NOTICIAS



Mercado y precios  
Estadísticas e informes



Documentación técnica  
Descarga archivos de tu interés



Visor de potencialidad  
Mapa de recursos e industrias

Keep informed through:

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**Thanks**

**[Alvaro.Picardo@jcyL.es](mailto:Alvaro.Picardo@jcyL.es)**

**¡ Obrigado !**

