
NAVAL STORES

ANNUAL SUMMARY

APRIL 1975-MARCH 1976

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75/76

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ANNUAL NAVAL STORES REPORT

April 1, 1975 - March 31, 1976

TURPENTINE PRODUCTION HITS 20 YEAR LOW

Domestic turpentine production during the 1975-76 crop year totaled 447,590 fifty-gallon barrels. This is 8 percent less than the 1974-75 crop year output and the lowest in the last two decades. The total was comprised of 5 percent gum turpentine, 9 percent steam distilled, and 86 percent sulphate turpentine.

Compared with the previous years' production, sulphate output was 6 percent lower and steam distilled was off 34 percent. Gum turpentine production was 33 percent higher.

AVAILABLE SUPPLY OF TURPENTINE SHRINKS

The available supply of turpentine during the 1975-76 crop year totaled 576,970 barrels compared with 617,520 barrels available during the previous crop year.

Turpentine imports were larger than the previous year, amounting to 58,640 barrels. This figure may be subject to revision later. Stocks of turpentine at all locations except retail on March 31, 1975 were 30 percent less than 1974. Gum turpentine stocks were 51 percent lower, steam distilled 45 percent lower, and sulphate turpentine 21 percent less.

TURPENTINE CONSUMPTION DROPS

Consumption of turpentine was reported 20 percent lower during the 1975-76 crop year than a year earlier. Industrial consumption was reported at 353,870 barrels compared with 439,730 barrels during 1974-75. The season average price for gum turpentine was \$1.59 per gallon, \$.20 higher than a year ago.

ROSIN PRODUCTION DOWN 16 PERCENT

Rosin production during the 1975-76 crop year amounted to 1.10 million drums compared with 1.31 million drums the previous year. Production this year consisted of 60 percent tall oil, 33 percent steam distilled, and 7 percent gum rosin. Compared with the previous year production was down 6 percent for tall oil and 35 percent for steam distilled but was up 32 percent for gum rosin.

AVAILABLE SUPPLY OF ROSIN 12 PERCENT LESS

Supply of rosin during the 1975 crop year was 1.39 million drums, 12 percent less than the previous year.

Stocks on hand March 31, 1975 at all positions except retail totaled 282,750 drums compared with 107,950 drums on the same date in 1974.

Imports amounted to 20,930 drums, a dramatic 87 percent drop from the previous year.

ROSIN CONSUMPTION DROPS

The reported industrial consumption of rosin dropped 12 percent during the 1975-76 crop year compared with the previous year. Of this total the chemical and rubber industries consumed 379,450 drums, the paper industry 309,510 drums, and the makers of ester gums and synthetic resins 211,970 drums.

TURPENTINE AND ROSIN: REPORTED CONSUMPTION, BY INDUSTRIES, APRIL 1 - MARCH 31

INDUSTRY	TURPENTINE		ROSIN <u>1/</u>	
	1974-75	1975-76	1974-75	1975-76
	BARRELS OF 50 GALLONS		DRUMS OF 520 POUNDS NET <u>2/</u>	
CHEMICALS AND RUBBER	431,670	349,950	482,050	379,450
ESTER GUMS AND SYNTHETIC RESIN			207,180	211,970
PAINT, VARNISH, AND LACQUER	990	870	28,140	16,480
PAPER AND PAPER SIZE	700	540	306,840	309,510
OTHER INDUSTRIES	6,370	2,510	79,140	50,820
TOTAL	439,730	353,870	1,103,350	968,230

1/ INCLUDES B-WOOD RESIN. 2/ GUM ROSIN IN DRUMS OF 517 POUNDS.

GUM NAVAL STORES: PRICE AND MARKET VALUE OF PRODUCTION, APRIL 1 - MARCH 31

ITEM	TURPENTINE		ROSIN		COMMERCIAL CRUDE GUM	
	1974-75	1975-76	1974-75	1975-76	1974-75	1975-76
	DOLLARS PER GALLON		DOLLARS PER 100 POUNDS		DOLLARS PER BARREL <u>1/</u>	
PRICE <u>2/</u>						
APR	1.000	1.600	28.47	32.13	67.10	65.17
MAY	1.098	1.600	29.64		70.10	62.15
JUNE	1.215	1.600	31.20	29.04	74.80	62.08
JUL	1.265	1.600	35.66	25.86	80.80	60.68
AUG	1.250	1.600	35.66	24.31	87.80	60.21
SEP		1.600	40.32	23.74	92.79	60.30
OCT	1.523	1.589	39.05	23.58	94.72	58.70
NOV	1.533	1.583	39.23	22.53	93.99	55.06
DEC	1.592	1.564		25.44	91.61	54.03
JAN	1.526	1.560	39.14	23.73	84.65	51.01
FEB	1.617		39.33	21.87	75.89	50.15
MAR	1.600	1.520	37.66	24.05	76.16	53.94
SEASON AVERAGE	1.389	1.585	35.92	25.15	84.36	59.59
MARKET VALUE OF PRODUCTION	1,000 DOLLARS		1,000 DOLLARS			
CROP YEAR	1,084	1,640	10,106	9,338		

1/ BARRELS OF 435 POUNDS NET. 2/ BASED ON MONTHLY DATA RELEASED BY THE MARKET NEWS SERVICE, RALEIGH, N. C. PRICE AT PROCESSING PLANTS FOR TURPENTINE IN TANK CARS F.O.B., ALL GRADES OF ROSIN IN DRUMS F.O.B. AND CRUDE GUM DELIVERED.

TURPENTINE: SUPPLY AND DISTRIBUTION, APRIL 1, 1974 - MARCH 31, 1975

ITEM	GUM	STEAM DISTILLED	SULFATE	TOTAL
BARRELS OF 50 GALLONS				
<u>SUPPLY</u>				
PRODUCTION				
APR	720	4,940	36,740	42,400
MAY	1,700	5,790	37,550	45,040
JUN	1,750	6,430	35,640	43,820
JUL	1,970	4,940	32,080	38,990
AUG	1,790	4,980	33,870	40,640
SEP	1,590	6,150	29,920	37,660
OCT	1,280	6,550	36,110	43,940
NOV	1,320	6,790	35,430	43,540
DEC	930	4,610	35,210	40,750
JAN	910	4,000	33,470	38,380
FEB	930	4,790	32,490	38,210
MAR	720	2,290	30,650	33,660
CROP YEAR	15,610	62,260	409,160	487,030
STOCKS BEGINNING OF YEAR <u>1/</u>	10,980	22,380	67,390	100,750
IMPORTS <u>2/</u>				29,740
AVAILABLE SUPPLY				617,520
<u>DISTRIBUTION</u>				
STOCKS END OF YEAR <u>1/</u>				
PRODUCTION PLANTS				
CCC CONTROLLED				
OTHER	1,360	9,230	23,140	33,730
TOTAL (PROD. PLANTS)	1,360	9,230	23,140	33,730
INDUSTRIAL PLANTS	390	470	29,650	30,510
DISTRIBUTION POINTS	3,630	2,570	300	6,500
TOTAL STOCKS	5,380	12,270	53,090	70,740
EXPORTS <u>2/</u>	2,090	6,320	7,900	16,310
APPARENT CONSUMPTION				530,470
TOTAL DISTRIBUTION				617,520
REPORTED INDUSTRIAL CONSUMPTION	2,030	61,300	376,400	439,730

1/ AT ALL POSITIONS EXCEPT RETAIL. 2/ AS REPORTED BY THE BUREAU OF THE CENSUS.

TURPENTINE: SUPPLY AND DISTRIBUTION, APRIL 1, 1975-MARCH 31, 1976

ITEM	GUM	STEAM DISTILLED	SULFATE	TOTAL
	BARRELS OF 50 GALLONS <u>SUPPLY</u>			
PRODUCTION				
APRIL	980	1,970	31,340	34,290
MAY	1,900	1,940	30,450	34,290
JUN	2,790	1,530	26,280	30,600
JUL	2,610	1,910	25,840	30,360
AUG	2,880	2,590	30,060	35,530
SEP	2,230	1,970	27,350	31,550
OCT	1,820	5,200	36,440	43,460
NOV	1,380	4,830	34,370	40,580
DEC	900	4,780	32,640	38,320
JAN	1,130	4,950	37,160	43,240
FEB	1,160	4,740	37,400	43,300
MAR	910	5,010	36,150	42,070
CROP YEAR	20,690	41,420	385,480	447,590
STOCKS BEGINNING OF YEAR <u>1/</u>	5,380	12,270	53,090	70,740
IMPORTS <u>2/</u>				58,640
AVAILABLE SUPPLY				576,970
	<u>DISTRIBUTION</u>			
STOCKS END OF YEAR <u>1/</u>				
PRODUCTION PLANTS				
CCC CONTROLLED				
OTHER	5,360	19,100	23,660	48,120
TOTAL (PROD. PLANTS)	5,360	19,100	23,660	48,120
INDUSTRIAL PLANTS	240	370	38,750	39,360
DISTRIBUTION POINTS	3,710	2,580	290	6,580
TOTAL STOCKS	9,310	22,050	62,700	94,060
EXPORTS <u>2/</u>	1,460	870	1,860	4,190
APPARENT CONSUMPTION				478,720
TOTAL DISTRIBUTION				576,970
REPORTED INDUSTRIAL CONSUMPTION	2,240	18,970	332,660	353,870

1/ AT ALL POSITIONS EXCEPT RETAIL.

2/ AS REPORTED BY THE BUREAU OF THE CENSUS.

ROSIN: SUPPLY AND DISTRIBUTION, APRIL 1, 1974 - MARCH 31, 1975

ITEM	GUM	STEAM DISTILLED	TALL OIL	TOTAL
		DRUMS OF 520 POUNDS NET <u>1/</u> <u>SUPPLY</u>		
PRODUCTION				
APR	2,540	58,960	76,000	137,500
MAY	5,810	47,700	61,140	114,650
JUN	5,740	46,210	68,120	120,070
JUL	5,480	49,040	62,140	116,660
AUG	5,940	43,810	62,650	112,400
SEP	5,050	58,640	56,380	120,070
OCT	5,130	55,090	57,590	117,810
NOV	5,970	53,090	60,570	119,630
DEC	4,040	35,140	61,250	100,430
JAN	3,390	36,360	51,780	91,530
FEB	3,180	39,130	51,150	93,460
MAR	2,150	23,930	35,840	61,920
CROP YEAR	54,420	547,100	704,610	1,306,130
STOCKS BEGINNING OF YEAR	32,900	37,490	37,560	107,950
IMPORTS <u>2/</u>				162,230
AVAILABLE SUPPLY				1,576,310
		<u>DISTRIBUTION</u>		
STOCKS END OF YEAR				
PRODUCTION PLANTS				
CCC CONTROLLED				
OTHER	9,750	75,900	65,000	150,650
TOTAL (PROD. PLANTS)	9,750	75,900	65,000	150,650
INDUSTRIAL PLANTS	78,900	23,110	21,420	123,430
DISTRIBUTION POINTS	8,120	100	450	8,670
TOTAL STOCKS	96,770	99,110	86,870	282,750
EXPORTS <u>2/</u>	18,270	131,630	118,010	267,910
APPARENT CONSUMPTION				1,025,650
TOTAL DISTRIBUTION				1,576,310
REPORTED INDUSTRIAL CONSUMPTION	110,560	401,340	591,450	1,103,350

1/ GUM ROSIN IN DRUMS OF 517 POUNDS. 2/ AS REPORTED BY THE BUREAU OF THE CENSUS.

ROSIN: SUPPLY AND DISTRIBUTION, APRIL 1, 1975 - MARCH 31, 1976

ITEM	GUM	STEAM DISTILLED	TALL OIL	TOTAL
DRUMS OF 520 POUNDS NET <u>1/</u> <u>SUPPLY</u>				
PRODUCTION				
APR	3,590	16,550	41,680	61,820
MAY	6,590	16,010	44,380	66,980
JUN	8,480	15,460	52,990	76,930
JUL	8,120	20,160	46,260	74,540
AUG	9,370	20,560	53,910	83,840
SEP	7,610	21,500	65,960	95,070
OCT	5,650	42,040	56,770	104,460
NOV	6,240	43,380	61,720	111,340
DEC	4,940	34,100	53,910	92,950
JAN	4,270	42,220	53,390	99,880
FEB	3,590	40,820	66,260	110,670
MAR	3,370	45,270	63,760	112,400
CROP YEAR	71,820	358,070	660,990	1,090,880
STOCKS BEGINNING OF YEAR	96,770	99,110	86,870	282,750
IMPORTS <u>2/</u>				20,930
AVAILABLE SUPPLY				1,394,560
<u>DISTRIBUTION</u>				
STOCKS END OF YEAR				
PRODUCTION PLANTS				
CCC CONTROLLED	6,390			6,390
OTHER	13,370	39,890	115,890	169,150
TOTAL (PROD. PLANTS)	19,760	39,890	115,890	175,540
INDUSTRIAL PLANTS	32,170	17,310	22,740	72,220
DISTRIBUTION POINTS	7,660	18,790	240	26,690
TOTAL STOCKS	59,590	75,990	138,870	274,450
EXPORTS <u>2/</u>	13,200	67,330	93,790	174,320
APPARENT CONSUMPTION				945,790
TOTAL DISTRIBUTION				1,394,560
REPORTED INDUSTRIAL CONSUMPTION	103,620	337,280	527,330	968,230

1/ GUM ROSIN IN DRUMS OF 517 POUNDS. 2/ AS REPORTED BY THE BUREAU OF THE CENSUS.

OTHER PRODUCTS: PRODUCTION AND EXPORTS, APRIL 1 - MARCH 31,
AND STOCKS AT PRODUCTION PLANTS

ITEMS	PINE OIL --		OTHER STEAM	
	ALL SOURCES		DISTILLED TERPENES	
	1974-75	1975-76	1974-75	1975-76
	BARRELS OF 50 GALLONS			
PRODUCTION				
APR	18,500	10,700	8,420	3,610
MAY	17,390	12,000	8,070	3,360
JUN	19,430	15,480	7,530	1,690
JUL	17,740	10,880	7,800	3,490
AUG	17,960	13,650	6,960	3,230
SEP	20,390	18,910	6,880	2,140
OCT	18,210	18,450	5,800	3,570
NOV	18,610	15,370	6,670	3,380
DEC	16,230	15,690	5,720	2,690
JAN	16,250	11,680	7,150	3,140
FEB	15,590	13,250	5,450	6,310
MAR	16,960	15,160	4,430	4,050
CROP YEAR	213,260	171,220	80,880	40,660
STOCKS END OF YEAR	22,510	25,370	102,720	30,200
EXPORTS - CROP				
YEAR 1/	94,370	72,070		
1/ AS REPORTED BY THE BUREAU OF THE CENSUS.				

STATE GUM TURPENTINE: STILL OUTPUT AND PERCENTAGE DISTRIBUTION,
APRIL 1 - MARCH 31

STATE	STILL		PERCENTAGE	
	OUTPUT		DISTRIBUTION	
	1974-75	1975-76	1974-75	1975-76
	BARRELS OF 50 GALLONS		PERCENT	
GA	13,210	18,300	84.6	88.4
OTHER STATES	2,400	2,390	15.4	11.6
U S	15,610	20,690	100.0	100.0