

Global Urushiol Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Urushiol market size is expected to reach \$ 41.95 million by 2032, rising at a market growth of 5.6% CAGR during the forecast period (2026-2032).

Urushiol is a group of long-chain catechol-based natural phenolic compounds primarily found in raw lacquer sap, lacquer trees, and selected plants of the Anacardiaceae family. It is the key active film-forming component of natural lacquer. Structurally, urushiol typically consists of a catechol ring and a long C15 or C17 alkyl or alkenyl side chain, with variations in side-chain length and unsaturation influencing curing behavior, film hardness, water resistance, corrosion resistance, adhesion, and allergenic potential. The scope of this study mainly covers industrial-grade urushiol extracted or enriched from natural raw lacquer, urushiol resin, urushiol-modified intermediates, urushiol-based functional material precursors, and research-grade urushiol reference substances used in analytical, toxicological, and pharmacological research. Urushiol can be converted into coating and resin systems through enzymatic curing, oxidative polymerization, graft modification, epoxidation, acrylation, titanate modification, phosphorylation, and other chemical routes. Its commercial value comes from its natural origin, excellent film-forming properties, chemical resistance, moisture and heat resistance, adhesion, anticorrosion performance, and functional modification potential. At the same time, urushiol is a strong skin sensitizer, so industrial handling, transportation, formulation, and downstream use require appropriate safety controls, analytical testing, hazard labeling, and regulatory compliance.

In 2025, the global production of urushiol is estimated at 1,150 tons, with an average price of US\$24,300 per ton and an average gross profit margin of 31.5%.

Based on our research, the urushiol market should not be treated as a broad natural

lacquer market, nor should it be merged with general bio-based phenols such as cardanol or cashew nut shell liquid. Urushiol is the key active film-forming component in natural raw lacquer, and its industrial value is mainly reflected in two layers: as a quality-determining component of natural lacquer and refined urushi materials, and as a bio-based catechol building block for anticorrosion, antifouling, UV-curable, flame-retardant, antimicrobial, and functional resin systems. Because urushiol is usually present as a mixture of catechol lipids rather than a single pure molecule, market modeling should be based on effective urushiol content, urushiol resin, and urushiol-based intermediates, rather than the total value of lacquerware or downstream coatings.

From a supply perspective, the industry is highly regional and resource-linked. China, Japan, Korea, and Taiwan are the most relevant supply regions for raw lacquer, refined lacquer, and traditional urushi materials. China has a broader base in lacquer tree resources, primary raw lacquer supply, urushiol-based anticorrosive coatings, and material modification projects. Japan and Korea are more associated with high-quality refined lacquer, traditional craft materials, and small-batch premium urushi supplies. European and U.S. suppliers are mainly active in research-grade urushiol reference substances and analytical materials. This creates a fragmented market structure where industrial urushiol producers, natural lacquer suppliers, and research chemical suppliers coexist, while ordinary coating companies, lacquerware workshops, and CNSL producers should be treated separately.

From a demand perspective, traditional use cases include natural lacquer coatings, lacquerware restoration, cultural heritage repair, high-end craft materials, and specialty wood or metal finishing. However, the more important incremental opportunities are emerging in functional materials. Publicly available research and government-related information indicate that urushiol is being explored or applied in marine antifouling coatings, UV-curable lacquer inks, urushiol-modified epoxy acrylates, and bio-based flame-retardant systems. These applications demonstrate the potential of urushiol as a renewable catechol-based platform molecule. Nevertheless, most of these markets are still small, specialized, and formulation-driven, meaning that urushiol is unlikely to become a bulk commodity chemical in the near term.

From a risk and competitive perspective, urushiol faces three structural constraints: allergenicity, raw material supply volatility, and competition from more scalable bio-based phenols. Handling and formulation require safety precautions because urushiol can cause strong allergic skin reactions. Supply is affected by lacquer tree cultivation, manual tapping, harvest seasons, regional climate, and raw lacquer grading. In downstream resin and coating applications, cardanol and CNSL-derived materials often

have stronger cost and scale advantages. As a result, urushiol's long-term opportunity lies less in low-cost substitution and more in high-value applications where natural lacquer chemistry, strong film formation, chemical resistance, adhesion, and bio-based positioning can justify premium pricing.

This report studies the global Urushiol production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Urushiol and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Urushiol that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Urushiol total production and demand, 2021-2032, (Tons)

Global Urushiol total production value, 2021-2032, (USD Million)

Global Urushiol production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Urushiol consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Urushiol domestic production, consumption, key domestic manufacturers and share

Global Urushiol production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Urushiol production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Urushiol production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Urushiol market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Biosynth, Alfa Chemistry, Unilong Industry, Haihang Industry, Sinochem Nanjing, Wuhan Guoqi, Urushi Tsutsumi, Joboji Urushi, Duco, Rethink Urushi, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Urushiol market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Urushiol Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Urushiol Market, Segmentation by Type:

Crude Urushiol-rich Raw Lacquer

Refined Urushiol

Urushiol Resin

Urushiol-modified Intermediate

Research-grade Urushiol Standard

Other

Global Urushiol Market, Segmentation by Source:

Lacquer Tree-derived Urushiol

Raw Lacquer-derived Urushiol

Poison Ivy/Oak-derived Urushiol

Synthetic or Semi-synthetic Urushiol Analog

Other

Global Urushiol Market, Segmentation by Grade:

Crude Natural Grade

Industrial Grade

Refined Coating Grade

Functional Material Grade

Analytical Reference Grade

Other

Global Urushiol Market, Segmentation by Application:

Lacquerware and Cultural Heritage

Industrial Anticorrosion

Marine Engineering

Research Institutions and Laboratories

Other

Companies Profiled:

Biosynth

Alfa Chemistry

Unilong Industry

Haihang Industry

Sinochem Nanjing

Wuhan Guoqi

Urushi Tsutsumi

Joboji Urushi

Duco

Rethink Urushi

Tanioka Shitsugei

The Nine Color

57Korea

PH Shell

Guchae Ottchil

Yunivers Hsieh

Goenne

UrushiLAB

Kremer Pigmente

Key Questions Answered:

1. How big is the global Urushiol market?
2. What is the demand of the global Urushiol market?
3. What is the year over year growth of the global Urushiol market?
4. What is the production and production value of the global Urushiol market?
5. Who are the key producers in the global Urushiol market?
6. What are the growth factors driving the market demand?

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