

# Global Urushiol Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Urushiol market size was valued at US\$ 28.76 million in 2025 and is forecast to a readjusted size of US\$ 41.95 million by 2032 with a CAGR of 5.6% during review period.

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 is a detailed and comprehensive analysis for global Urushiol market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

#### Key Features:

Global Urushiol market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Urushiol market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Urushiol market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Urushiol market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 2021-2026

#### The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Urushiol

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Urushiol market based on the following parameters - company overview, sales quantity, revenue, 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.

### Market Segmentation

Urushiol market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

#### Market segment by Type

Crude Urushiol-rich Raw Lacquer

Refined Urushiol

Urushiol Resin

Urushiol-modified Intermediate

Research-grade Urushiol Standard

Other

#### Market segment by Source

Lacquer Tree-derived Urushiol

Raw Lacquer-derived Urushiol

Poison Ivy/Oak-derived Urushiol

Synthetic or Semi-synthetic Urushiol Analog

Other

#### Market segment by Grade

Crude Natural Grade

Industrial Grade

Refined Coating Grade

Functional Material Grade

Analytical Reference Grade

Other

#### Market segment by Application

Lacquerware and Cultural Heritage

Industrial Anticorrosion

Marine Engineering

Research Institutions and Laboratories

Other

#### Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Urushiol product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Urushiol, with price, sales quantity, revenue, and global market share of Urushiol from 2021 to 2026.

Chapter 3, the Urushiol competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Urushiol breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Urushiol market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Urushiol.

Chapter 14 and 15, to describe Urushiol sales channel, distributors, customers,

research findings and conclusion.

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