

Global Urushiol Market Growth 2026-2032

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Abstracts

The global Urushiol market size is predicted to grow from US\$ 27.34 million in 2025 to US\$ 40.68 million in 2032; it is expected to grow at a CAGR of 5.9% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Urushiol Industry Forecast" looks at past sales and reviews total world Urushiol sales in 2025, providing a comprehensive analysis by region and market sector of projected Urushiol sales for 2026 through 2032. With Urushiol sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Urushiol industry.

This Insight Report provides a comprehensive analysis of the global Urushiol landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Urushiol portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Urushiol market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Urushiol and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Urushiol.

This report presents a comprehensive overview, market shares, and growth opportunities of Urushiol market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Crude Urushiol-rich Raw Lacquer

Refined Urushiol

Urushiol Resin

Urushiol-modified Intermediate

Research-grade Urushiol Standard

Other

Segmentation by Source:

Lacquer Tree-derived Urushiol

Raw Lacquer-derived Urushiol

Poison Ivy/Oak-derived Urushiol

Synthetic or Semi-synthetic Urushiol Analog

Other

Segmentation by Grade:

Crude Natural Grade

Industrial Grade

Refined Coating Grade

Functional Material Grade

Analytical Reference Grade

Other

Segmentation by Application:

Lacquerware and Cultural Heritage

Industrial Anticorrosion

Marine Engineering

Research Institutions and Laboratories

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Urushiol market?

What factors are driving Urushiol market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Urushiol market opportunities vary by end market size?

How does Urushiol break out by Type, by Application?

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