

# Global White Graphite (Hexagonal Boron Nitride) Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global White Graphite (Hexagonal Boron Nitride) market size is expected to reach \$ 354 million by 2032, rising at a market growth of 4.9% CAGR during the forecast period (2026-2032).

White Graphite, or Hexagonal Boron Nitride, is a layered crystalline functional ceramic material composed of boron and nitrogen. Because its crystal structure resembles graphite, it has lamellar sliding behavior, yet unlike graphite it is white in color and provides excellent electrical insulation. Its core value lies in combining thermal conductivity, high-temperature resistance, corrosion resistance, lubricity, release performance, low dielectric properties, and chemical inertness. It can be supplied as powders, thermal fillers, coatings, hot-pressed ceramic parts, pyrolytic boron nitride components, and CVD films. The material addresses key challenges such as balancing heat dissipation and insulation in high-power electronics, controlling adhesion and contamination in high-temperature metal and glass processing, and meeting purity, heat resistance, and stability requirements in semiconductor equipment and crystal growth systems. Typical customers include thermal interface material producers, engineering plastics and composite manufacturers, metal casting and glass processing companies, semiconductor equipment and compound semiconductor crystal growth companies, as well as premium cosmetics and two-dimensional materials research institutions. Its commercial models mainly include standard powder grade sales, particle size and morphology customization, functional coating formulations, precision ceramic machining, and high-purity PBN component customization. Product performance is usually evaluated by particle size, purity, specific surface area, thermal conductivity, dielectric properties, maximum operating temperature, and processing compatibility.

The industrial value of White Graphite, or Hexagonal Boron Nitride, is expanding from a

single-purpose lubricant and release material into a functional ceramic platform for high-power, high-temperature, and high-reliability applications. Its layered crystal structure provides graphite-like low friction and lamellar sliding behavior, while its white appearance and electrical insulation distinguish it from conductive carbon materials. In electronic material systems, hexagonal boron nitride can serve as a thermally conductive filler to improve heat transfer in polymers, adhesives, potting compounds, and composites while maintaining insulation and low dielectric properties. This makes it suitable for thermal design in power devices, electric vehicle electronics, communication equipment, and high-frequency components. In high-temperature industries, the material relies on heat resistance, chemical inertness, and non-wetting behavior to provide release, anti-sticking, lubrication, and isolation functions, helping reduce contamination, mold sticking, and surface defects in molten metal, glass, and ceramic processing. As end equipment moves toward higher power density, higher reliability, and more demanding operating conditions, material supply is no longer limited to basic powders. It is evolving into integrated solutions built around particle size, morphology, purity, surface compatibility, and processing stability.

Industry supply shows a structure of high-end concentration combined with regional expansion. Companies in Europe, the United States, and Japan have accumulated capabilities in high-purity powders, thermal fillers, hot-pressed ceramics, PBN components, and CVD films, with product portfolios covering electronic thermal management, high-temperature coatings, semiconductor processes, and advanced materials research. Mainland Chinese companies are expanding supply in hexagonal boron nitride powders, coatings, and boron-based materials, forming additional capacity for industrial applications and selected electronic material uses. Because the performance of White Graphite depends heavily on purity, particle size distribution, crystal integrity, and surface condition, customer adoption usually requires formulation validation, process validation, and long-term stability testing. This makes competition in the high-end market closer to application material system competition than simple price competition. Future supply capability will be evaluated not only by whether a company can produce hexagonal boron nitride, but by whether it can consistently provide material grades with specific morphology, specific particle size, low impurity levels, high thermal conductivity, low dielectric properties, and compatibility with customer process windows.

Long-term demand opportunities mainly come from electronic thermal management, new energy vehicles, semiconductor manufacturing, compound semiconductor crystal growth, and high-temperature advanced manufacturing. Rising requirements for the combination of thermal conductivity and electrical insulation in power semiconductors, battery systems, servers, communication equipment, and high-frequency materials are

increasing the additive value of hexagonal boron nitride in thermal interface materials, thermally conductive plastics, potting compounds, and composite substrates. Semiconductor and crystal growth applications emphasize material purity, heat resistance, low outgassing, and chemical stability, supporting the higher added value of PBN and high-purity BN ceramic components. Traditional metal processing, glass forming, lubrication, and cosmetics applications still provide a stable demand base, but stronger growth momentum is more likely to come from high-end electronics and advanced manufacturing. Price trends are expected to diverge. Standard industrial powders may face competitive pressure from regional supply expansion, while high-purity, special-morphology, and semiconductor-grade products should have stronger value retention because of validation cycles, technical barriers, and customer stickiness.

This report studies the global White Graphite (Hexagonal Boron Nitride) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for White Graphite (Hexagonal Boron Nitride) 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 White Graphite (Hexagonal Boron Nitride) that contribute to its increasing demand across many markets.

#### Highlights and key features of the study

Global White Graphite (Hexagonal Boron Nitride) total production and demand, 2021-2032, (Tons)

Global White Graphite (Hexagonal Boron Nitride) total production value, 2021-2032, (USD Million)

Global White Graphite (Hexagonal Boron Nitride) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global White Graphite (Hexagonal Boron Nitride) consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: White Graphite (Hexagonal Boron Nitride) domestic production, consumption, key domestic manufacturers and share

Global White Graphite (Hexagonal Boron Nitride) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global White Graphite (Hexagonal Boron Nitride) production by Functional Characteristics, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global White Graphite (Hexagonal Boron Nitride) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global White Graphite (Hexagonal Boron Nitride) 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 Saint-Gobain, Momenite Technologies, 3M, H?gan?s, U.K. Abrasives, Denka, Henze BNP, Resonac, Shin-Etsu Chemical, Zibo Xinfukang Specialty Materials, 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 White Graphite (Hexagonal Boron Nitride) 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 Functional Characteristics, 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 White Graphite (Hexagonal Boron Nitride) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global White Graphite (Hexagonal Boron Nitride) Market, Segmentation by Functional Characteristics:

Thermal Conductivity and Electrical Insulation

Mold Release and Anti-Sticking

High-Temperature Lubrication

Corrosion Resistance and Isolation

Low Dielectric and Electrical Insulation

Other

Global White Graphite (Hexagonal Boron Nitride) Market, Segmentation by Product Form:

Powder

Granules

Coating

Ceramic Part

Other

Global White Graphite (Hexagonal Boron Nitride) Market, Segmentation by Manufacturing Proces:

High-Temperature Synthesis

Pyrolytic Deposition

Chemical Vapor Deposition

Hot Pressing and Sintering

Surface Treatment and Granulation

Dispersion and Coating Preparation

#### Global White Graphite (Hexagonal Boron Nitride) Market, Segmentation by Application:

Electronic Thermal Management

Mold Release for Metal and Glass Forming

High-Temperature Industrial Lubrication

Semiconductor Processing and Crystal Growth

Polymer Modification and Composites

Cosmetics and Personal Care

2D Materials and Research Devices

Other

#### Companies Profiled:

Saint-Gobain

Momentive Technologies

3M

H?gan?s

U.K. Abrasives

Denka

Henze BNP

Resonac

Shin-Etsu Chemical

Zibo Xinfukang Specialty Materials

Dandong Chemical Engineering Institute

Kennametal

ZYP Coatings

Grolltex

Zibo Sinyo Nitride Materials

Yingkou Liaobin Fine Chemical

Liaoning Boron Technology

Xi'an Tanyun Chemical

#### Key Questions Answered:

1. How big is the global White Graphite (Hexagonal Boron Nitride) market?
2. What is the demand of the global White Graphite (Hexagonal Boron Nitride) market?
3. What is the year over year growth of the global White Graphite (Hexagonal Boron Nitride) market?
4. What is the production and production value of the global White Graphite (Hexagonal Boron Nitride) market?
5. Who are the key producers in the global White Graphite (Hexagonal Boron Nitride) market?

6. What are the growth factors driving the market demand?

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