

Global Isotropic Graphite Block Market Growth 2026-2032

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Abstracts

The global Isotropic Graphite Block market size is predicted to grow from US\$ 920 million in 2025 to US\$ 1188 million in 2032; it is expected to grow at a CAGR of 3.7% from 2026 to 2032.

Isotropic Graphite Block is a high-performance synthetic graphite material manufactured primarily by cold isostatic pressing (CIP), in which finely milled coke and binder are compacted uniformly from all directions and subsequently carbonized and graphitized at high temperature. This process produces a fine- or ultra-fine-grained graphite block with a highly homogeneous microstructure and nearly uniform physical, thermal and mechanical properties in different directions. Compared with conventional extruded or vibration-molded graphite, isotropic graphite generally offers higher density, finer grain size, higher mechanical strength, excellent machinability, high thermal and electrical conductivity, low thermal expansion, strong thermal-shock resistance and the capability to achieve very high purity. It is supplied principally as rectangular or round blocks and is subsequently machined into susceptors, heaters, crucibles, electrodes, molds and other precision graphite components.

Key Findings

Isotropic Graphite Block demand is concentrated in semiconductor, photovoltaic, EDM and high-temperature industrial processing

Grades with average grain sizes of $\geq 10 \mu\text{m}$ represent the performance-oriented end of the product spectrum

Semiconductor component manufacturing is a key high-value application requiring high

purity and stable thermal performance

East Asia represents a major production and consumption cluster supported by semiconductor and photovoltaic manufacturing

Market Trends

The Isotropic Graphite Block industry is moving toward finer microstructures, higher purity, tighter batch consistency and deeper downstream processing. Semiconductor and compound-semiconductor manufacturing increasingly requires graphite components capable of maintaining dimensional stability and low contamination under high-temperature and chemically aggressive process conditions. This is encouraging producers to strengthen purification, precision machining and surface-treatment capabilities in addition to basic block production. SiC- and TaC-coated graphite solutions are becoming increasingly important in crystal growth and epitaxial processes, reinforcing the transition from standardized graphite materials toward application-specific engineered graphite systems. At the same time, leading suppliers are expanding or optimizing isotropic graphite capacity and downstream finishing operations, indicating that future competition will increasingly depend on integrated capabilities covering graphite block production, purification, machining and coating rather than production volume alone.

Market Dynamics

Drivers

Demand for Isotropic Graphite Block is primarily supported by semiconductor manufacturing, photovoltaic production, high-temperature industrial processing and precision EDM. Semiconductor crystal growth, epitaxy and related thermal processes require graphite materials with stable thermal conductivity, high-temperature resistance, controlled purity and consistent mechanical properties. Photovoltaic manufacturing also consumes graphite components in polysilicon, crystal-growth and furnace thermal-field systems. In addition, the consumable nature of many graphite parts creates recurring replacement demand. Expansion of advanced semiconductor materials, particularly silicon carbide, is increasing the technical requirements placed on graphite materials and encouraging investment in higher-purity, fine-grain and coated products.

Restraints

Isotropic Graphite Block manufacturing is capital-, energy- and know-how-intensive. The process requires controlled grinding and mixing, isostatic pressing, lengthy carbonization and graphitization cycles, and in higher-end applications additional purification and precision machining. High graphitization temperatures create meaningful electricity exposure, while petroleum coke, specialized carbon feedstocks and pitch influence both cost and final product consistency. Long production cycles limit the ability of suppliers to respond rapidly to sudden shifts in demand, and yield losses can rise when customers require extremely tight purity, density, grain-size and dimensional tolerances. These characteristics create a structural cost disadvantage for smaller producers lacking integrated process control.

Opportunities

The most attractive opportunities are shifting toward high-purity and ultra-fine-grain Isotropic Graphite Block for semiconductor, SiC power-device, advanced crystal-growth and precision thermal-processing applications. Suppliers capable of integrating block production with purification, complex machining and SiC or TaC coating can capture more value per unit of graphite material and participate more deeply in customers' process development. Localization of high-performance graphite supply is another opportunity as semiconductor and photovoltaic manufacturers seek greater supply-chain resilience. In emerging applications, larger block dimensions, improved material homogeneity and longer component life may expand the addressable market for engineered isotropic graphite in advanced furnaces, specialty metallurgy and next-generation thermal systems.

Challenges

The principal challenge is achieving consistent performance across large production batches while maintaining competitive manufacturing economics. High-end customers evaluate not only nominal grain size but also impurity concentration, apparent density, electrical resistivity, thermal conductivity, flexural strength and variation within individual blocks. Semiconductor applications further increase the importance of contamination control and stable behavior under repeated thermal cycling. Producers must therefore balance capacity expansion with process reproducibility and qualification requirements. Competition from established global suppliers and rapidly improving Asian manufacturers is also raising the threshold for product differentiation, while excessive capacity additions in standardized grades could intensify price competition in lower-value segments.

Industry Chain Analysis

The upstream chain for Isotropic Graphite Block centers on selected petroleum coke and other carbonaceous feedstocks, binder pitch, process gases and substantial electricity inputs. Raw materials are ground and classified to obtain the required particle distribution, mixed with binder and formed through cold isostatic pressing. The green blocks then undergo carbonization, and certain grades receive pitch impregnation and rebaking before graphitization at temperatures approaching approximately 3,000°C. High-end materials may subsequently undergo purification, precision machining and surface treatment. The complete production route can extend over several months, making process control, furnace utilization and working-capital management important operating variables.

Value creation increases significantly toward the downstream end of the chain. Standard graphite blocks derive value mainly from material consistency, usable dimensions and production yield, while semiconductor-grade materials gain additional value from purification, precision tolerances, complex geometries and specialized coatings. Downstream customers include semiconductor equipment and component manufacturers, photovoltaic thermal-field component producers, EDM electrode manufacturers, industrial furnace suppliers and other high-temperature equipment manufacturers. Consequently, suppliers with integrated material production and finishing capabilities are generally better positioned to participate in high-specification applications and maintain closer technical relationships with end users.

Segment Insights

By average grain size, the 5–10 µm and 10–20 µm segments constitute the technologically demanding portion of the Isotropic Graphite Block market. Finer and more homogeneous structures generally support tighter machining tolerances, more consistent physical properties and performance in applications requiring high purity and precision, making these grades particularly relevant to semiconductor processing and precision EDM. The 10–20 µm category provides a broader balance among performance, manufacturability and cost and can address multiple thermal-processing and industrial applications. Products with average grain size above 20 µm serve requirements where extreme surface finish or ultra-fine structural uniformity is less critical but isotropic behavior, high-temperature resistance and machinability remain important.

The strategic direction of segmentation is therefore not simply toward smaller grain size

across all applications. Customers increasingly select grades according to a combination of grain size, density, strength, electrical resistivity, thermal characteristics, purity and block dimensions. This favors manufacturers with broad grade portfolios and the ability to tailor processing parameters rather than suppliers competing only on nominal grain specification.

Downstream Market Opportunities

Semiconductor Component Manufacturing offers the strongest high-value opportunity because graphite components are exposed to demanding combinations of temperature, vacuum, reactive gases and contamination limits in crystal growth, epitaxy, ion implantation and related processes. Photovoltaic Thermal Field Parts remain an important volume application in silicon and polysilicon production, while Electric Discharge Machining Electrode applications benefit from fine-grain structures, machinability and dimensional accuracy. High-Temperature Furnace Fitting applications provide a diversified industrial demand base across sintering, heat treatment and specialty materials processing. Future value growth is likely to be increasingly concentrated in applications where graphite blocks are further purified, precision-machined or coated before final use.

Regional Insights

Asia, particularly East Asia, forms the central manufacturing and consumption region for Isotropic Graphite Block. China, Japan and surrounding Asian manufacturing economies combine substantial graphite production capacity with large semiconductor, photovoltaic, electronics and high-temperature processing industries. Japan maintains a particularly strong position in high-end isotropic graphite technology, material consistency and semiconductor-oriented grades, while China has developed a broad producer base spanning established large-scale suppliers and rapidly expanding specialty graphite manufacturers. The combination of downstream manufacturing concentration and expanding domestic supply capacity continues to strengthen Asia's role in the industry.

Europe and North America remain strategically important high-value markets, particularly for semiconductor processing, advanced industrial furnaces and specialized material applications. Major international suppliers maintain manufacturing and finishing assets across these regions and continue to invest in capacity serving semiconductor and SiC-related demand. Regional competition is therefore increasingly characterized by a combination of global material-production networks and localized machining,

purification and customer-support capabilities.

Competitive Landscape Analysis

The Isotropic Graphite Block market combines established multinational advanced-material suppliers with a broad group of Asian specialty graphite manufacturers. SGL Carbon, Toyo Tanso, Mersen, Entegris (POCO Graphite), Tokai Carbon, IBIDEN and Nippon Techno-Carbon have established capabilities in high-performance graphite materials, while Schunk Carbon Technology participates through advanced graphite materials and downstream applications. The competitive base also includes Olmec Advanced Materials, Jinsun Carbon, Dalian Shungji Technology Industry, Huixian City Mishan Graphite Jip, East Carbon, Pingdingshan Oriental Carbon, Dantan, Chengchen Graphite, SIAMC Advanced Materials, Chengdu Fangda Carbon Carbon Composite Materials, Henan Wuxing New Material Technology, Graphite India, Henan Wanguan Industrial, Suzhou Doneka New Materials and CARBONS TECH & CREATION (HENAN) INDUSTRY. Competitive differentiation increasingly centers on grain uniformity, block dimensions, purity, process stability, machining capability, purification and coating technologies, as well as the ability to satisfy application-specific qualification requirements. High-end suppliers are increasingly competing through integrated material-to-component capabilities, whereas cost efficiency and production scale remain more influential in standardized industrial grades.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Isotropic Graphite Block 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 Isotropic Graphite Block portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Isotropic Graphite Block market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Isotropic Graphite Block 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 Isotropic Graphite Block.

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

Market Segmentation

Segmentation by Type:

Average Grain Size: $\leq 5 \mu\text{m}$

Average Grain Size: 5–10 μm

Average Grain Size: 10–20 μm

Average Grain Size: $>20 \mu\text{m}$

Segmentation by Purity Grade:

Standard-Purity Isotropic Graphite Block

High-Purity Isotropic Graphite Block

Segmentation by Block Form:

Rectangular Block

Cylindrical Block

Segmentation by Application:

Semiconductor Component Manufacturing

Photovoltaic Thermal Field Parts

Electric Discharge Machining Electrode

High?Temperature Furnace Fitting

Others

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.

SGL

Toyo Tanso

Mersen

Entegris?POCO Graphite?

Tokai Carbon

IBIDEN

Nippon Techno-Carbon Co., Ltd

Olmec Advanced Materials

Jinsun Carbon

Dalian Shungji Technology Industry Co., Ltd.

Huixian City Mishan Graphite Jip Co., Ltd.

East Carbon

Pingdingshan Oriental Carbon

Dantan

Schunk Carbon Technology

Chengchen Graphite (Qingdao) Co., LTD.

SIAMC Advanced Materials Co., Ltd.

Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd.

Henan Wuxing New Material Technology Co., Ltd.

Graphite India

Henan Wanguan Industrial Co., Ltd.

Suzhou Doneka New Materials Co., Ltd.

CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Isotropic Graphite Block market?

What factors are driving Isotropic Graphite Block market growth, globally and by region?

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

How do Isotropic Graphite Block market opportunities vary by end market size?

How does Isotropic Graphite Block break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Isotropic Graphite Block Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Isotropic Graphite Block by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Isotropic Graphite Block by Country/Region, 2021, 2025 & 2032

2.2 Isotropic Graphite Block Segment by Type

- 2.2.1 Average Grain Size: ?5 ?m
- 2.2.2 Average Grain Size: 5–10 ?m
- 2.2.3 Average Grain Size: 10–20 ?m
- 2.2.4 Average Grain Size: >20 ?m
- 2.2.5 Isotropic Graphite Block Sales by Type
 - 2.2.5.1 Global Isotropic Graphite Block Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Isotropic Graphite Block Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Isotropic Graphite Block Sale Price by Type (2021-2026)

2.3 Isotropic Graphite Block Segment by Purity Grade

- 2.3.1 Standard-Purity Isotropic Graphite Block
- 2.3.2 High-Purity Isotropic Graphite Block
- 2.3.3 Isotropic Graphite Block Sales by Purity Grade
 - 2.3.3.1 Global Isotropic Graphite Block Sales Market Share by Purity Grade (2021-2026)
 - 2.3.3.2 Global Isotropic Graphite Block Revenue and Market Share by Purity Grade (2021-2026)

- 2.3.3.3 Global Isotropic Graphite Block Sale Price by Purity Grade (2021-2026)
- 2.4 Isotropic Graphite Block Segment by Block Form
 - 2.4.1 Rectangular Block
 - 2.4.2 Cylindrical Block
 - 2.4.3 Isotropic Graphite Block Sales by Block Form
 - 2.4.3.1 Global Isotropic Graphite Block Sales Market Share by Block Form (2021-2026)
 - 2.4.3.2 Global Isotropic Graphite Block Revenue and Market Share by Block Form (2021-2026)
 - 2.4.3.3 Global Isotropic Graphite Block Sale Price by Block Form (2021-2026)
- 2.5 Isotropic Graphite Block Segment by Application
 - 2.5.1 Semiconductor Component Manufacturing
 - 2.5.2 Photovoltaic Thermal Field Parts
 - 2.5.3 Electric Discharge Machining Electrode
 - 2.5.4 High-Temperature Furnace Fitting
 - 2.5.5 Others
 - 2.5.6 Isotropic Graphite Block Sales by Application
 - 2.5.6.1 Global Isotropic Graphite Block Sale Market Share by Application (2021-2026)
 - 2.5.6.2 Global Isotropic Graphite Block Revenue and Market Share by Application (2021-2026)
 - 2.5.6.3 Global Isotropic Graphite Block Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

- 3.1 Global Isotropic Graphite Block Breakdown Data by Company
 - 3.1.1 Global Isotropic Graphite Block Annual Sales by Company (2021-2026)
 - 3.1.2 Global Isotropic Graphite Block Sales Market Share by Company (2021-2026)
- 3.2 Global Isotropic Graphite Block Annual Revenue by Company (2021-2026)
 - 3.2.1 Global Isotropic Graphite Block Revenue by Company (2021-2026)
 - 3.2.2 Global Isotropic Graphite Block Revenue Market Share by Company (2021-2026)
- 3.3 Global Isotropic Graphite Block Sale Price by Company
- 3.4 Key Manufacturers Isotropic Graphite Block Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Isotropic Graphite Block Product Location Distribution
 - 3.4.2 Players Isotropic Graphite Block Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis

- 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ISOTROPIC GRAPHITE BLOCK BY GEOGRAPHIC REGION

- 4.1 World Historic Isotropic Graphite Block Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Isotropic Graphite Block Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Isotropic Graphite Block Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Isotropic Graphite Block Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Isotropic Graphite Block Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Isotropic Graphite Block Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Isotropic Graphite Block Sales Growth
- 4.4 APAC Isotropic Graphite Block Sales Growth
- 4.5 Europe Isotropic Graphite Block Sales Growth
- 4.6 Middle East & Africa Isotropic Graphite Block Sales Growth

5 AMERICAS

- 5.1 Americas Isotropic Graphite Block Sales by Country
 - 5.1.1 Americas Isotropic Graphite Block Sales by Country (2021-2026)
 - 5.1.2 Americas Isotropic Graphite Block Revenue by Country (2021-2026)
- 5.2 Americas Isotropic Graphite Block Sales by Type (2021-2026)
- 5.3 Americas Isotropic Graphite Block Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Isotropic Graphite Block Sales by Region
 - 6.1.1 APAC Isotropic Graphite Block Sales by Region (2021-2026)
 - 6.1.2 APAC Isotropic Graphite Block Revenue by Region (2021-2026)
- 6.2 APAC Isotropic Graphite Block Sales by Type (2021-2026)
- 6.3 APAC Isotropic Graphite Block Sales by Application (2021-2026)

- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe Isotropic Graphite Block by Country
 - 7.1.1 Europe Isotropic Graphite Block Sales by Country (2021-2026)
 - 7.1.2 Europe Isotropic Graphite Block Revenue by Country (2021-2026)
- 7.2 Europe Isotropic Graphite Block Sales by Type (2021-2026)
- 7.3 Europe Isotropic Graphite Block Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Isotropic Graphite Block by Country
 - 8.1.1 Middle East & Africa Isotropic Graphite Block Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Isotropic Graphite Block Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Isotropic Graphite Block Sales by Type (2021-2026)
- 8.3 Middle East & Africa Isotropic Graphite Block Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks
- 9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

- 10.1 Raw Material and Suppliers
- 10.2 Manufacturing Cost Structure Analysis of Isotropic Graphite Block
- 10.3 Manufacturing Process Analysis of Isotropic Graphite Block
- 10.4 Industry Chain Structure of Isotropic Graphite Block

11 MARKETING, DISTRIBUTORS AND CUSTOMER

- 11.1 Sales Channel
 - 11.1.1 Direct Channels
 - 11.1.2 Indirect Channels
- 11.2 Isotropic Graphite Block Distributors
- 11.3 Isotropic Graphite Block Customer

12 WORLD FORECAST REVIEW FOR ISOTROPIC GRAPHITE BLOCK BY GEOGRAPHIC REGION

- 12.1 Global Isotropic Graphite Block Market Size Forecast by Region
 - 12.1.1 Global Isotropic Graphite Block Forecast by Region (2027-2032)
 - 12.1.2 Global Isotropic Graphite Block Annual Revenue Forecast by Region (2027-2032)
- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Isotropic Graphite Block Forecast by Type (2027-2032)
- 12.7 Global Isotropic Graphite Block Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

- 13.1 SGL
 - 13.1.1 SGL Company Information
 - 13.1.2 SGL Isotropic Graphite Block Product Portfolios and Specifications
 - 13.1.3 SGL Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.1.4 SGL Main Business Overview
 - 13.1.5 SGL Latest Developments

13.2 Toyo Tanso

13.2.1 Toyo Tanso Company Information

13.2.2 Toyo Tanso Isotropic Graphite Block Product Portfolios and Specifications

13.2.3 Toyo Tanso Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Toyo Tanso Main Business Overview

13.2.5 Toyo Tanso Latest Developments

13.3 Mersen

13.3.1 Mersen Company Information

13.3.2 Mersen Isotropic Graphite Block Product Portfolios and Specifications

13.3.3 Mersen Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Mersen Main Business Overview

13.3.5 Mersen Latest Developments

13.4 Entegris?POCO Graphite?

13.4.1 Entegris?POCO Graphite? Company Information

13.4.2 Entegris?POCO Graphite? Isotropic Graphite Block Product Portfolios and Specifications

13.4.3 Entegris?POCO Graphite? Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Entegris?POCO Graphite? Main Business Overview

13.4.5 Entegris?POCO Graphite? Latest Developments

13.5 Tokai Carbon

13.5.1 Tokai Carbon Company Information

13.5.2 Tokai Carbon Isotropic Graphite Block Product Portfolios and Specifications

13.5.3 Tokai Carbon Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Tokai Carbon Main Business Overview

13.5.5 Tokai Carbon Latest Developments

13.6 IBIDEN

13.6.1 IBIDEN Company Information

13.6.2 IBIDEN Isotropic Graphite Block Product Portfolios and Specifications

13.6.3 IBIDEN Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 IBIDEN Main Business Overview

13.6.5 IBIDEN Latest Developments

13.7 Nippon Techno-Carbon Co., Ltd

13.7.1 Nippon Techno-Carbon Co., Ltd Company Information

13.7.2 Nippon Techno-Carbon Co., Ltd Isotropic Graphite Block Product Portfolios and

Specifications

13.7.3 Nippon Techno-Carbon Co., Ltd Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Nippon Techno-Carbon Co., Ltd Main Business Overview

13.7.5 Nippon Techno-Carbon Co., Ltd Latest Developments

13.8 Olmec Advanced Materials

13.8.1 Olmec Advanced Materials Company Information

13.8.2 Olmec Advanced Materials Isotropic Graphite Block Product Portfolios and Specifications

13.8.3 Olmec Advanced Materials Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Olmec Advanced Materials Main Business Overview

13.8.5 Olmec Advanced Materials Latest Developments

13.9 Jinsun Carbon

13.9.1 Jinsun Carbon Company Information

13.9.2 Jinsun Carbon Isotropic Graphite Block Product Portfolios and Specifications

13.9.3 Jinsun Carbon Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Jinsun Carbon Main Business Overview

13.9.5 Jinsun Carbon Latest Developments

13.10 Dalian Shungji Technology Industry Co., Ltd.

13.10.1 Dalian Shungji Technology Industry Co., Ltd. Company Information

13.10.2 Dalian Shungji Technology Industry Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

13.10.3 Dalian Shungji Technology Industry Co., Ltd. Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Dalian Shungji Technology Industry Co., Ltd. Main Business Overview

13.10.5 Dalian Shungji Technology Industry Co., Ltd. Latest Developments

13.11 Huixian City Mishan Graphite Jip Co., Ltd.

13.11.1 Huixian City Mishan Graphite Jip Co., Ltd. Company Information

13.11.2 Huixian City Mishan Graphite Jip Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

13.11.3 Huixian City Mishan Graphite Jip Co., Ltd. Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Huixian City Mishan Graphite Jip Co., Ltd. Main Business Overview

13.11.5 Huixian City Mishan Graphite Jip Co., Ltd. Latest Developments

13.12 East Carbon

13.12.1 East Carbon Company Information

13.12.2 East Carbon Isotropic Graphite Block Product Portfolios and Specifications

13.12.3 East Carbon Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 East Carbon Main Business Overview

13.12.5 East Carbon Latest Developments

13.13 Pingdingshan Oriental Carbon

13.13.1 Pingdingshan Oriental Carbon Company Information

13.13.2 Pingdingshan Oriental Carbon Isotropic Graphite Block Product Portfolios and Specifications

13.13.3 Pingdingshan Oriental Carbon Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Pingdingshan Oriental Carbon Main Business Overview

13.13.5 Pingdingshan Oriental Carbon Latest Developments

13.14 Dantan

13.14.1 Dantan Company Information

13.14.2 Dantan Isotropic Graphite Block Product Portfolios and Specifications

13.14.3 Dantan Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Dantan Main Business Overview

13.14.5 Dantan Latest Developments

13.15 Schunk Carbon Technology

13.15.1 Schunk Carbon Technology Company Information

13.15.2 Schunk Carbon Technology Isotropic Graphite Block Product Portfolios and Specifications

13.15.3 Schunk Carbon Technology Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Schunk Carbon Technology Main Business Overview

13.15.5 Schunk Carbon Technology Latest Developments

13.16 Chengchen Graphite (Qingdao) Co., LTD.

13.16.1 Chengchen Graphite (Qingdao) Co., LTD. Company Information

13.16.2 Chengchen Graphite (Qingdao) Co., LTD. Isotropic Graphite Block Product Portfolios and Specifications

13.16.3 Chengchen Graphite (Qingdao) Co., LTD. Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Chengchen Graphite (Qingdao) Co., LTD. Main Business Overview

13.16.5 Chengchen Graphite (Qingdao) Co., LTD. Latest Developments

13.17 SIAMC Advanced Materials Co., Ltd.

13.17.1 SIAMC Advanced Materials Co., Ltd. Company Information

13.17.2 SIAMC Advanced Materials Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

13.17.3 SIAMC Advanced Materials Co., Ltd. Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 SIAMC Advanced Materials Co., Ltd. Main Business Overview

13.17.5 SIAMC Advanced Materials Co., Ltd. Latest Developments

13.18 Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd.

13.18.1 Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd. Company Information

13.18.2 Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

13.18.3 Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd. Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd. Main Business Overview

13.18.5 Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd. Latest Developments

13.19 Henan Wuxing New Material Technology Co., Ltd.

13.19.1 Henan Wuxing New Material Technology Co., Ltd. Company Information

13.19.2 Henan Wuxing New Material Technology Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

13.19.3 Henan Wuxing New Material Technology Co., Ltd. Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Henan Wuxing New Material Technology Co., Ltd. Main Business Overview

13.19.5 Henan Wuxing New Material Technology Co., Ltd. Latest Developments

13.20 Graphite India

13.20.1 Graphite India Company Information

13.20.2 Graphite India Isotropic Graphite Block Product Portfolios and Specifications

13.20.3 Graphite India Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Graphite India Main Business Overview

13.20.5 Graphite India Latest Developments

13.21 Henan Wanguan Industrial Co., Ltd.

13.21.1 Henan Wanguan Industrial Co., Ltd. Company Information

13.21.2 Henan Wanguan Industrial Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

13.21.3 Henan Wanguan Industrial Co., Ltd. Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 Henan Wanguan Industrial Co., Ltd. Main Business Overview

13.21.5 Henan Wanguan Industrial Co., Ltd. Latest Developments

13.22 Suzhou Doneka New Materials Co., Ltd.

13.22.1 Suzhou Doneka New Materials Co., Ltd. Company Information

13.22.2 Suzhou Doneka New Materials Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

13.22.3 Suzhou Doneka New Materials Co., Ltd. Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.22.4 Suzhou Doneka New Materials Co., Ltd. Main Business Overview

13.22.5 Suzhou Doneka New Materials Co., Ltd. Latest Developments

13.23 CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD.

13.23.1 CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD. Company Information

13.23.2 CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD. Isotropic Graphite Block Product Portfolios and Specifications

13.23.3 CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD. Isotropic Graphite Block Sales, Revenue, Price and Gross Margin (2021-2026)

13.23.4 CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD. Main Business Overview

13.23.5 CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Isotropic Graphite Block Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Isotropic Graphite Block Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Average Grain Size: 5–10 µm

Table 4. Major Players of Average Grain Size: 10–20 µm

Table 5. Major Players of Average Grain Size: 20–40 µm

Table 6. Major Players of Average Grain Size: >40 µm

Table 7. Global Isotropic Graphite Block Sales by Type (2021-2026) & (Tons)

Table 8. Global Isotropic Graphite Block Sales Market Share by Type (2021-2026)

Table 9. Global Isotropic Graphite Block Revenue by Type (2021-2026) & (\$ million)

Table 10. Global Isotropic Graphite Block Revenue Market Share by Type (2021-2026)

Table 11. Global Isotropic Graphite Block Sale Price by Type (2021-2026) & (US\$/Ton)

Table 12. Major Players of Standard-Purity Isotropic Graphite Block

Table 13. Major Players of High-Purity Isotropic Graphite Block

Table 14. Global Isotropic Graphite Block Sales by Purity Grade (2021-2026) & (Tons)

Table 15. Global Isotropic Graphite Block Sales Market Share by Purity Grade (2021-2026)

Table 16. Global Isotropic Graphite Block Revenue by Purity Grade (2021-2026) & (\$ million)

Table 17. Global Isotropic Graphite Block Revenue Market Share by Purity Grade (2021-2026)

Table 18. Global Isotropic Graphite Block Sale Price by Purity Grade (2021-2026) & (US\$/Ton)

Table 19. Major Players of Rectangular Block

Table 20. Major Players of Cylindrical Block

Table 21. Global Isotropic Graphite Block Sales by Block Form (2021-2026) & (Tons)

Table 22. Global Isotropic Graphite Block Sales Market Share by Block Form (2021-2026)

Table 23. Global Isotropic Graphite Block Revenue by Block Form (2021-2026) & (\$ million)

Table 24. Global Isotropic Graphite Block Revenue Market Share by Block Form (2021-2026)

Table 25. Global Isotropic Graphite Block Sale Price by Block Form (2021-2026) & (US\$/Ton)

Table 26. Global Isotropic Graphite Block Sale by Application (2021-2026) & (Tons)

Table 27. Global Isotropic Graphite Block Sale Market Share by Application (2021-2026)

Table 28. Global Isotropic Graphite Block Revenue by Application (2021-2026) & (\$ million)

Table 29. Global Isotropic Graphite Block Revenue Market Share by Application (2021-2026)

Table 30. Global Isotropic Graphite Block Sale Price by Application (2021-2026) & (US\$/Ton)

Table 31. Global Isotropic Graphite Block Sales by Company (2021-2026) & (Tons)

Table 32. Global Isotropic Graphite Block Sales Market Share by Company (2021-2026)

Table 33. Global Isotropic Graphite Block Revenue by Company (2021-2026) & (\$ millions)

Table 34. Global Isotropic Graphite Block Revenue Market Share by Company (2021-2026)

Table 35. Global Isotropic Graphite Block Sale Price by Company (2021-2026) & (US\$/Ton)

Table 36. Key Manufacturers Isotropic Graphite Block Producing Area Distribution and Sales Area

Table 37. Players Isotropic Graphite Block Products Offered

Table 38. Isotropic Graphite Block Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 39. New Products and Potential Entrants

Table 40. Market M&A Activity & Strategy

Table 41. Global Isotropic Graphite Block Sales by Geographic Region (2021-2026) & (Tons)

Table 42. Global Isotropic Graphite Block Sales Market Share Geographic Region (2021-2026)

Table 43. Global Isotropic Graphite Block Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 44. Global Isotropic Graphite Block Revenue Market Share by Geographic Region (2021-2026)

Table 45. Global Isotropic Graphite Block Sales by Country/Region (2021-2026) & (Tons)

Table 46. Global Isotropic Graphite Block Sales Market Share by Country/Region (2021-2026)

Table 47. Global Isotropic Graphite Block Revenue by Country/Region (2021-2026) & (\$ millions)

Table 48. Global Isotropic Graphite Block Revenue Market Share by Country/Region

(2021-2026)

Table 49. Americas Isotropic Graphite Block Sales by Country (2021-2026) & (Tons)

Table 50. Americas Isotropic Graphite Block Sales Market Share by Country
(2021-2026)

Table 51. Americas Isotropic Graphite Block Revenue by Country (2021-2026) & (\$
millions)

Table 52. Americas Isotropic Graphite Block Sales by Type (2021-2026) & (Tons)

Table 53. Americas Isotropic Graphite Block Sales by Application (2021-2026) & (Tons)

Table 54. APAC Isotropic Graphite Block Sales by Region (2021-2026) & (Tons)

Table 55. APAC Isotropic Graphite Block Sales Market Share by Region (2021-2026)

Table 56. APAC Isotropic Graphite Block Revenue by Region (2021-2026) & (\$ millions)

Table 57. APAC Isotropic Graphite Block Sales by Type (2021-2026) & (Tons)

Table 58. APAC Isotropic Graphite Block Sales by Application (2021-2026) & (Tons)

Table 59. Europe Isotropic Graphite Block Sales by Country (2021-2026) & (Tons)

Table 60. Europe Isotropic Graphite Block Revenue by Country (2021-2026) & (\$
millions)

Table 61. Europe Isotropic Graphite Block Sales by Type (2021-2026) & (Tons)

Table 62. Europe Isotropic Graphite Block Sales by Application (2021-2026) & (Tons)

Table 63. Middle East & Africa Isotropic Graphite Block Sales by Country (2021-2026) &
(Tons)

Table 64. Middle East & Africa Isotropic Graphite Block Revenue Market Share by
Country (2021-2026)

Table 65. Middle East & Africa Isotropic Graphite Block Sales by Type (2021-2026) &
(Tons)

Table 66. Middle East & Africa Isotropic Graphite Block Sales by Application
(2021-2026) & (Tons)

Table 67. Key Market Drivers & Growth Opportunities of Isotropic Graphite Block

Table 68. Key Market Challenges & Risks of Isotropic Graphite Block

Table 69. Key Industry Trends of Isotropic Graphite Block

Table 70. Isotropic Graphite Block Raw Material

Table 71. Key Suppliers of Raw Materials

Table 72. Isotropic Graphite Block Distributors List

Table 73. Isotropic Graphite Block Customer List

Table 74. Global Isotropic Graphite Block Sales Forecast by Region (2027-2032) &
(Tons)

Table 75. Global Isotropic Graphite Block Revenue Forecast by Region (2027-2032) &
(\$ millions)

Table 76. Americas Isotropic Graphite Block Sales Forecast by Country (2027-2032) &
(Tons)

Table 77. Americas Isotropic Graphite Block Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 78. APAC Isotropic Graphite Block Sales Forecast by Region (2027-2032) & (Tons)

Table 79. APAC Isotropic Graphite Block Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 80. Europe Isotropic Graphite Block Sales Forecast by Country (2027-2032) & (Tons)

Table 81. Europe Isotropic Graphite Block Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. Middle East & Africa Isotropic Graphite Block Sales Forecast by Country (2027-2032) & (Tons)

Table 83. Middle East & Africa Isotropic Graphite Block Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 84. Global Isotropic Graphite Block Sales Forecast by Type (2027-2032) & (Tons)

Table 85. Global Isotropic Graphite Block Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 86. Global Isotropic Graphite Block Sales Forecast by Application (2027-2032) & (Tons)

Table 87. Global Isotropic Graphite Block Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 88. SGL Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 89. SGL Isotropic Graphite Block Product Portfolios and Specifications

Table 90. SGL Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 91. SGL Main Business

Table 92. SGL Latest Developments

Table 93. Toyo Tanso Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 94. Toyo Tanso Isotropic Graphite Block Product Portfolios and Specifications

Table 95. Toyo Tanso Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 96. Toyo Tanso Main Business

Table 97. Toyo Tanso Latest Developments

Table 98. Mersen Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 99. Mersen Isotropic Graphite Block Product Portfolios and Specifications

Table 100. Mersen Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price

(US\$/Ton) and Gross Margin (2021-2026)

Table 101. Mersen Main Business

Table 102. Mersen Latest Developments

Table 103. Entegris?POCO Graphite? Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 104. Entegris?POCO Graphite? Isotropic Graphite Block Product Portfolios and Specifications

Table 105. Entegris?POCO Graphite? Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 106. Entegris?POCO Graphite? Main Business

Table 107. Entegris?POCO Graphite? Latest Developments

Table 108. Tokai Carbon Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 109. Tokai Carbon Isotropic Graphite Block Product Portfolios and Specifications

Table 110. Tokai Carbon Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 111. Tokai Carbon Main Business

Table 112. Tokai Carbon Latest Developments

Table 113. IBIDEN Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 114. IBIDEN Isotropic Graphite Block Product Portfolios and Specifications

Table 115. IBIDEN Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 116. IBIDEN Main Business

Table 117. IBIDEN Latest Developments

Table 118. Nippon Techno-Carbon Co., Ltd Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 119. Nippon Techno-Carbon Co., Ltd Isotropic Graphite Block Product Portfolios and Specifications

Table 120. Nippon Techno-Carbon Co., Ltd Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 121. Nippon Techno-Carbon Co., Ltd Main Business

Table 122. Nippon Techno-Carbon Co., Ltd Latest Developments

Table 123. Olmec Advanced Materials Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 124. Olmec Advanced Materials Isotropic Graphite Block Product Portfolios and Specifications

Table 125. Olmec Advanced Materials Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 126. Olmec Advanced Materials Main Business
Table 127. Olmec Advanced Materials Latest Developments
Table 128. Jinsun Carbon Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors
Table 129. Jinsun Carbon Isotropic Graphite Block Product Portfolios and Specifications
Table 130. Jinsun Carbon Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 131. Jinsun Carbon Main Business
Table 132. Jinsun Carbon Latest Developments
Table 133. Dalian Shungji Technology Industry Co., Ltd. Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors
Table 134. Dalian Shungji Technology Industry Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications
Table 135. Dalian Shungji Technology Industry Co., Ltd. Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 136. Dalian Shungji Technology Industry Co., Ltd. Main Business
Table 137. Dalian Shungji Technology Industry Co., Ltd. Latest Developments
Table 138. Huixian City Mishan Graphite Jip Co., Ltd. Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors
Table 139. Huixian City Mishan Graphite Jip Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications
Table 140. Huixian City Mishan Graphite Jip Co., Ltd. Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 141. Huixian City Mishan Graphite Jip Co., Ltd. Main Business
Table 142. Huixian City Mishan Graphite Jip Co., Ltd. Latest Developments
Table 143. East Carbon Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors
Table 144. East Carbon Isotropic Graphite Block Product Portfolios and Specifications
Table 145. East Carbon Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 146. East Carbon Main Business
Table 147. East Carbon Latest Developments
Table 148. Pingdingshan Oriental Carbon Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors
Table 149. Pingdingshan Oriental Carbon Isotropic Graphite Block Product Portfolios and Specifications
Table 150. Pingdingshan Oriental Carbon Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 151. Pingdingshan Oriental Carbon Main Business

Table 152. Pingdingshan Oriental Carbon Latest Developments

Table 153. Dantan Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 154. Dantan Isotropic Graphite Block Product Portfolios and Specifications

Table 155. Dantan Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 156. Dantan Main Business

Table 157. Dantan Latest Developments

Table 158. Schunk Carbon Technology Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 159. Schunk Carbon Technology Isotropic Graphite Block Product Portfolios and Specifications

Table 160. Schunk Carbon Technology Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 161. Schunk Carbon Technology Main Business

Table 162. Schunk Carbon Technology Latest Developments

Table 163. Chengchen Graphite (Qingdao) Co., LTD. Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 164. Chengchen Graphite (Qingdao) Co., LTD. Isotropic Graphite Block Product Portfolios and Specifications

Table 165. Chengchen Graphite (Qingdao) Co., LTD. Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 166. Chengchen Graphite (Qingdao) Co., LTD. Main Business

Table 167. Chengchen Graphite (Qingdao) Co., LTD. Latest Developments

Table 168. SIAMC Advanced Materials Co., Ltd. Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 169. SIAMC Advanced Materials Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

Table 170. SIAMC Advanced Materials Co., Ltd. Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 171. SIAMC Advanced Materials Co., Ltd. Main Business

Table 172. SIAMC Advanced Materials Co., Ltd. Latest Developments

Table 173. Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd. Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 174. Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

Table 175. Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd. Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin

(2021-2026)

Table 176. Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd. Main Business

Table 177. Chengdu Fangda Carbon Carbon Composite Materials Co., Ltd. Latest Developments

Table 178. Henan Wuxing New Material Technology Co., Ltd. Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 179. Henan Wuxing New Material Technology Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

Table 180. Henan Wuxing New Material Technology Co., Ltd. Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 181. Henan Wuxing New Material Technology Co., Ltd. Main Business

Table 182. Henan Wuxing New Material Technology Co., Ltd. Latest Developments

Table 183. Graphite India Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 184. Graphite India Isotropic Graphite Block Product Portfolios and Specifications

Table 185. Graphite India Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 186. Graphite India Main Business

Table 187. Graphite India Latest Developments

Table 188. Henan Wanguan Industrial Co., Ltd. Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 189. Henan Wanguan Industrial Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

Table 190. Henan Wanguan Industrial Co., Ltd. Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 191. Henan Wanguan Industrial Co., Ltd. Main Business

Table 192. Henan Wanguan Industrial Co., Ltd. Latest Developments

Table 193. Suzhou Doneka New Materials Co., Ltd. Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 194. Suzhou Doneka New Materials Co., Ltd. Isotropic Graphite Block Product Portfolios and Specifications

Table 195. Suzhou Doneka New Materials Co., Ltd. Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 196. Suzhou Doneka New Materials Co., Ltd. Main Business

Table 197. Suzhou Doneka New Materials Co., Ltd. Latest Developments

Table 198. CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD. Basic Information, Isotropic Graphite Block Manufacturing Base, Sales Area and Its Competitors

Table 199. CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD. Isotropic Graphite Block Product Portfolios and Specifications

Table 200. CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD. Isotropic Graphite Block Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 201. CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD. Main Business

Table 202. CARBONS TECH & CREATION (HENAN) INDUSTRY CO., LTD. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Isotropic Graphite Block
- Figure 2. Isotropic Graphite Block Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Isotropic Graphite Block Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global Isotropic Graphite Block Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Isotropic Graphite Block Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Isotropic Graphite Block Sales Market Share by Country/Region (2025)
- Figure 10. Isotropic Graphite Block Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Average Grain Size: 25 µm
- Figure 12. Product Picture of Average Grain Size: 5–10 µm
- Figure 13. Product Picture of Average Grain Size: 10–20 µm
- Figure 14. Product Picture of Average Grain Size: >20 µm
- Figure 15. Global Isotropic Graphite Block Sales Market Share by Type in 2026
- Figure 16. Global Isotropic Graphite Block Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Standard-Purity Isotropic Graphite Block
- Figure 18. Product Picture of High-Purity Isotropic Graphite Block
- Figure 19. Global Isotropic Graphite Block Sales Market Share by Purity Grade in 2026
- Figure 20. Global Isotropic Graphite Block Revenue Market Share by Purity Grade (2021-2026)
- Figure 21. Product Picture of Rectangular Block
- Figure 22. Product Picture of Cylindrical Block
- Figure 23. Global Isotropic Graphite Block Sales Market Share by Block Form in 2026
- Figure 24. Global Isotropic Graphite Block Revenue Market Share by Block Form (2021-2026)
- Figure 25. Isotropic Graphite Block Consumed in Semiconductor Component Manufacturing
- Figure 26. Global Isotropic Graphite Block Market: Semiconductor Component Manufacturing (2021-2026) & (Tons)
- Figure 27. Isotropic Graphite Block Consumed in Photovoltaic Thermal Field Parts
- Figure 28. Global Isotropic Graphite Block Market: Photovoltaic Thermal Field Parts (2021-2026) & (Tons)

Figure 29. Isotropic Graphite Block Consumed in Electric Discharge Machining Electrode

Figure 30. Global Isotropic Graphite Block Market: Electric Discharge Machining Electrode (2021-2026) & (Tons)

Figure 31. Isotropic Graphite Block Consumed in High-Temperature Furnace Fitting

Figure 32. Global Isotropic Graphite Block Market: High-Temperature Furnace Fitting (2021-2026) & (Tons)

Figure 33. Isotropic Graphite Block Consumed in Others

Figure 34. Global Isotropic Graphite Block Market: Others (2021-2026) & (Tons)

Figure 35. Global Isotropic Graphite Block Sale Market Share by Application (2025)

Figure 36. Global Isotropic Graphite Block Revenue Market Share by Application in 2025

Figure 37. Isotropic Graphite Block Sales by Company in 2025 (Tons)

Figure 38. Global Isotropic Graphite Block Sales Market Share by Company in 2025

Figure 39. Isotropic Graphite Block Revenue by Company in 2025 (\$ millions)

Figure 40. Global Isotropic Graphite Block Revenue Market Share by Company in 2025

Figure 41. Global Isotropic Graphite Block Sales Market Share by Geographic Region (2021-2026)

Figure 42. Global Isotropic Graphite Block Revenue Market Share by Geographic Region in 2025

Figure 43. Americas Isotropic Graphite Block Sales 2021-2026 (Tons)

Figure 44. Americas Isotropic Graphite Block Revenue 2021-2026 (\$ millions)

Figure 45. APAC Isotropic Graphite Block Sales 2021-2026 (Tons)

Figure 46. APAC Isotropic Graphite Block Revenue 2021-2026 (\$ millions)

Figure 47. Europe Isotropic Graphite Block Sales 2021-2026 (Tons)

Figure 48. Europe Isotropic Graphite Block Revenue 2021-2026 (\$ millions)

Figure 49. Middle East & Africa Isotropic Graphite Block Sales 2021-2026 (Tons)

Figure 50. Middle East & Africa Isotropic Graphite Block Revenue 2021-2026 (\$ millions)

Figure 51. Americas Isotropic Graphite Block Sales Market Share by Country in 2025

Figure 52. Americas Isotropic Graphite Block Revenue Market Share by Country (2021-2026)

Figure 53. Americas Isotropic Graphite Block Sales Market Share by Type (2021-2026)

Figure 54. Americas Isotropic Graphite Block Sales Market Share by Application (2021-2026)

Figure 55. United States Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 56. Canada Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 57. Mexico Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 58. Brazil Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 59. APAC Isotropic Graphite Block Sales Market Share by Region in 2025

Figure 60. APAC Isotropic Graphite Block Revenue Market Share by Region (2021-2026)

Figure 61. APAC Isotropic Graphite Block Sales Market Share by Type (2021-2026)

Figure 62. APAC Isotropic Graphite Block Sales Market Share by Application (2021-2026)

Figure 63. China Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 64. Japan Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 65. South Korea Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 66. Southeast Asia Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 67. India Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 68. Australia Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 69. China Taiwan Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 70. Europe Isotropic Graphite Block Sales Market Share by Country in 2025

Figure 71. Europe Isotropic Graphite Block Revenue Market Share by Country (2021-2026)

Figure 72. Europe Isotropic Graphite Block Sales Market Share by Type (2021-2026)

Figure 73. Europe Isotropic Graphite Block Sales Market Share by Application (2021-2026)

Figure 74. Germany Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 75. France Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 76. UK Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 77. Italy Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 78. Russia Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 79. Middle East & Africa Isotropic Graphite Block Sales Market Share by Country (2021-2026)

Figure 80. Middle East & Africa Isotropic Graphite Block Sales Market Share by Type (2021-2026)

Figure 81. Middle East & Africa Isotropic Graphite Block Sales Market Share by Application (2021-2026)

Figure 82. Egypt Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 83. South Africa Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 84. Israel Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 85. Turkey Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 86. GCC Countries Isotropic Graphite Block Revenue Growth 2021-2026 (\$ millions)

Figure 87. Manufacturing Cost Structure Analysis of Isotropic Graphite Block in 2026

Figure 88. Manufacturing Process Analysis of Isotropic Graphite Block

Figure 89. Industry Chain Structure of Isotropic Graphite Block

Figure 90. Channels of Distribution

Figure 91. Global Isotropic Graphite Block Sales Market Forecast by Region (2027-2032)

Figure 92. Global Isotropic Graphite Block Revenue Market Share Forecast by Region (2027-2032)

Figure 93. Global Isotropic Graphite Block Sales Market Share Forecast by Type (2027-2032)

Figure 94. Global Isotropic Graphite Block Revenue Market Share Forecast by Type (2027-2032)

Figure 95. Global Isotropic Graphite Block Sales Market Share Forecast by Application (2027-2032)

Figure 96. Global Isotropic Graphite Block Revenue Market Share Forecast by Application (2027-2032)

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