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Global Nuclear Main Steam & Feed Water Isolation Valves Market Size study & Forecast, by Type, Configuration, Application, Material, End-User, and Regional Forecasts 2025-2035

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Abstracts

The Global Nuclear Main Steam & Feed Water Isolation Valves Market is valued at approximately USD 1.2 billion in 2024 and is projected to expand at a steady CAGR of 5.00% over the forecast timeline from 2025 to 2035. These critical safety valves, embedded within the operational heart of nuclear reactors, play a pivotal role in regulating the containment and controlled flow of steam and feed water, especially during emergency shutdowns or transient conditions. The rising emphasis on nuclear safety compliance and refurbishment of aging infrastructure, particularly in mature energy markets, is stimulating adoption of technologically robust valve solutions. From pressurized water reactors (PWRs) to boiling water reactors (BWRs), the use of isolation valves has become indispensable in mitigating risk and sustaining uninterrupted reactor functionality under adverse conditions.

The market is gaining substantial momentum through increasing investments in nuclear energy expansion, particularly as countries pivot toward cleaner base-load energy alternatives. The ongoing shift away from fossil fuels, combined with ambitious net-zero emission commitments, has reinstated nuclear power as a viable solution. This revival is pushing nuclear facility developers and EPC (Engineering, Procurement, and Construction) contractors to retrofit existing stations and integrate resilient valve configurations capable of withstanding high pressure, radiation, and temperature. Globe and gate valve variants are finding increasing utility due to their reliable shut-off capabilities, especially in high-demand environments. Nevertheless, the market could face friction from public opposition to nuclear infrastructure and the complexity of nuclear-grade certification and material procurement.

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Regionally, the nuclear main steam and feed water isolation valves market spans a diverse landscape. North America leads the market owing to its robust nuclear infrastructure, particularly in the United States, which operates the world's largest fleet of commercial nuclear reactors. Europe, with its push to modernize and extend the life cycle of nuclear reactors in countries like France, the UK, and Finland, also contributes significantly to market revenue. Meanwhile, Asia Pacific is emerging as a hotbed of opportunity, particularly with aggressive nuclear development in China, India, and South Korea. These nations are not only ramping up nuclear capacity but are also emphasizing next-gen valve technologies for higher reactor efficiency and lower environmental impact. Latin America and the Middle East & Africa, while smaller in market share, are steadily moving towards nuclear viability as part of long-term strategic energy diversification plans.

Major market player included in this report are:

Halliburton Company

Chevron Phillips Chemical Company

Trican Well Service Ltd.

BASF SE

M&D Industries Of Louisiana, Inc.

Schlumberger Limited

Baker Hughes Company

Aubin Group

Impact Fluid Solutions

Croda International Plc.

HYDAC International GmbH

Parker Hannifin Corporation

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Linde plc

Bosch Rexroth AG

Air Liquide

Global Nuclear Main Steam & Feed Water Isolation Valves Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Type:

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Globe Valves

Gate Valves

By Configuration:

Single-Body Valves

Double-Body Valves

By Application:

Boiling Water Reactors (BWR)

Pressurized Water Reactors (PWR)

By Material:

Stainless Steel

Carbon Steel

By End-User:

Nuclear Power Plants

Engineering, Procurement, and Construction (EPC) Contractors

By Region:

North America

U.S.

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- Canada

Europe

- UK
- Germany
- France
- Spain
- Italy
- Rest of Europe

Asia Pacific

- China
- India
- Japan
- Australia
- South Korea
- Rest of Asia Pacific

Latin America

- Brazil
- Mexico

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Middle East & Africa

- UAE
- Saudi Arabia
- South Africa
- Rest of Middle East & Africa

Key Takeaways:

- Market Estimates & Forecast for 10 years from 2025 to 2035.
- Annualized revenues and regional level analysis for each market segment.
- Detailed analysis of geographical landscape with Country level analysis of major regions.
- Competitive landscape with information on major players in the market.
- Analysis of key business strategies and recommendations on future market approach.
- Analysis of competitive structure of the market.
- Demand side and supply side analysis of the market.

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CHAPTER 11. COMPETITIVE INTELLIGENCE

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Fig 19. Global Nuclear Main Steam & Feed Water Isolation Valves Market, Company Market Share Analysis (2025)

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