

Global Main Pump for Nuclear Island Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Main Pump for Nuclear Island market size is expected to reach \$ 3061 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

The main pump of the nuclear island plays a crucial role in driving the circulation of high-temperature and high-pressure coolant and removing heat from the reactor core. Its reliable operation is directly related to the safety of the nuclear reactor. Once it fails, it will lead to the risk of core meltdown. It is a key piece of equipment to ensure the safe power generation of nuclear power plants. In 2024, global Main Pump for Nuclear Island production reached approximately 196,000 units, with an average global market price of around US\$10,000 per unit. In 2024, the global 's total production capacity of Main Pump for Nuclear Island reached 240,000 units. The industry average gross profit margin of this product reached 35%.

The upstream segment of the nuclear island main pump supply chain primarily comprises suppliers of specialty steels, nickel-based alloys, stainless steel castings and forgings, motor materials, bearing materials, mechanical seal materials, control systems, and nuclear-grade instrumentation. Key components—such as pump casings, impellers, main shafts, flywheels, mechanical seals, and motor rotors and stators—must meet nuclear-grade material certification and long-term reliability standards. The midstream segment consists of enterprises involved in the design, manufacturing, assembly, and testing of nuclear island main pumps, encompassing fluid design, nuclear-grade welding, precision machining, vibration testing, thermal-hydraulic performance testing, and nuclear safety certification. The downstream segment primarily includes nuclear power plant operators, engineering, procurement, and construction (EPC) contractors, and reactor design firms, covering projects such as

large pressurized water reactors (PWRs), advanced reactors, and certain small modular reactors (SMRs). As nuclear island main pumps are classified as nuclear safety Class 1 equipment, the supply chain is highly concentrated; suppliers typically must undergo design certification, obtain manufacturing licenses, pass quality system audits, and complete long-term validation within nuclear power projects.

Driven by the global energy transition, rising demand for low-carbon energy, and renewed policy support for nuclear power, the demand for nuclear island main pumps is expected to grow through both new construction projects and the upgrading of existing power plants. While traditional large PWRs remain the dominant market, the development of SMRs, advanced PWRs, and novel nuclear energy systems is generating demand for a new generation of nuclear-grade pump equipment. Additionally, with a large number of global nuclear units having operated for over 30 years and entering cycles for life extension and equipment replacement, the market for the maintenance, replacement, and upgrading of nuclear island main pumps will become a significant source of growth. Future industry expansion is projected to stem primarily from regions with growing nuclear power sectors—such as China, India, the Middle East, and Eastern Europe—as well as from equipment maintenance needs in mature markets like the United States, France, and Japan.

Report Scope

This report studies the global Main Pump for Nuclear Island production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Main Pump for Nuclear Island 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 Main Pump for Nuclear Island that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Main Pump for Nuclear Island total production and demand, 2021-2032, (K Units)

Global Main Pump for Nuclear Island total production value, 2021-2032, (USD Million)

Global Main Pump for Nuclear Island production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Main Pump for Nuclear Island consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Main Pump for Nuclear Island domestic production, consumption, key domestic manufacturers and share

Global Main Pump for Nuclear Island production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Main Pump for Nuclear Island production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Main Pump for Nuclear Island production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Main Pump for Nuclear Island 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 Flowserve, KSB Group, Hayward Tyler, Westinghouse Electric Company, Framatome-Dongfang, Deep Blue Pump, Curtiss-Wright, ANDRITZ Group, Harbin Electric Corporation, Kirloskar Brothers Limited, 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 Main Pump for Nuclear Island market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, 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 Main Pump for Nuclear Island Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Main Pump for Nuclear Island Market, Segmentation by Type:

Reactor Coolant Pumps

Chemistry and Volumetric Control (CVS) Pumps

Global Main Pump for Nuclear Island Market, Segmentation by Shaft Seal Type:

Shaft Seal Pump

Sealless Pump

Global Main Pump for Nuclear Island Market, Segmentation by

Configuration:

Vertical Main Pump

Horizontal Main Pump

Global Main Pump for Nuclear Island Market, Segmentation by Application:

Pressurized Water Reactor

Boiling Water Reactor

Companies Profiled:

Flowserve

KSB Group

Hayward Tyler

Westinghouse Electric Company

Framatome-Dongfang

Deep Blue Pump

Curtiss-Wright

ANDRITZ Group

Harbin Electric Corporation

Kirloskar Brothers Limited

Mitsubishi Heavy Industries

Shanghai Apollo Machinery

HMS Group

Shengu Group

Sulzer

Key Questions Answered:

1. How big is the global Main Pump for Nuclear Island market?
2. What is the demand of the global Main Pump for Nuclear Island market?
3. What is the year over year growth of the global Main Pump for Nuclear Island market?
4. What is the production and production value of the global Main Pump for Nuclear Island market?
5. Who are the key producers in the global Main Pump for Nuclear Island market?
6. What are the growth factors driving the market demand?

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