

Global Nuclear-grade Metal Bellows Seal Assemblies Market Growth 2026-2032

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Abstracts

The global Nuclear-grade Metal Bellows Seal Assemblies market size is predicted to grow from US\$ 233 million in 2025 to US\$ 357 million in 2032; it is expected to grow at a CAGR of 6.2% from 2026 to 2032.

Nuclear grade metal bellows seal assemblies are high reliability metallic sealing components used in nuclear power plants, research reactors, nuclear fuel cycle facilities and nuclear safety related fluid systems. They mainly rely on the elastic deformation, axial compensation and displacement isolation capability of thin wall metal bellows to achieve long term low leakage sealing at valve stems, pump shafts, penetrations, instrumentation valves and control valves. The products mainly cover metal bellows seals for nuclear valves, bellows mechanical seals for pumps, containment penetration bellows seals, bellows seal assemblies for nuclear instrumentation valves and customized nuclear metal bellows seal assemblies. Core manufacturing processes include low cobalt stainless steel and nickel alloy material control, precision thin wall forming, edge welding or longitudinal welding, heat treatment, helium mass spectrometer leak testing, fatigue life validation, pressure cycling tests, seismic qualification and nuclear quality assurance document traceability. Key specifications include material grade, diameter, wall thickness, number of convolutions, displacement capacity, pressure rating, leakage rate, cycle life and nuclear safety class. The products are mainly used in nuclear globe valves, gate valves, control valves, Class 2 and Class 3 nuclear pumps, auxiliary seals for reactor coolant pumps, radioactive medium isolation systems and containment pressure boundary positions. In 2025, the global average price of nuclear grade metal bellows seal assemblies is estimated at about 5.2 K USD/unit, global deliveries are estimated at about 45,800 unit, and the industry average gross margin is about 32% to 44%.

The value chain of nuclear grade metal bellows seal assemblies has the clear characteristics of a high reliability component industry. The upstream segment includes low cobalt stainless steel, nickel alloys, precision thin metal sheets, welding materials, leak testing equipment, fatigue test systems and nuclear quality inspection services. The midstream segment covers metal bellows forming, welding, heat treatment, mechanical seal design, assembly and full process quality validation. The downstream segment mainly serves nuclear valves, nuclear pumps, containment penetrations, instrumentation valves, control valves, nuclear fuel cycle facilities and outage replacement demand in operating nuclear power plants. Although the product category is relatively small in revenue scale, it sits close to pressure boundary integrity and radioactive fluid isolation. Failure cost is high, qualification cycles are long, and customers place greater emphasis on material consistency, weld stability, verified service life and proven project references than on simple price comparison. This makes the entry barrier much higher than that of general industrial bellows or standard mechanical seals.

The competitive landscape combines international high end suppliers with regional nuclear supply chains. Established global suppliers have accumulated strong capabilities in edge welded metal bellows, pump mechanical seals, valve stem bellows sealing and nuclear quality documentation. Regional suppliers are gaining positions through local nuclear projects, maintenance spare parts and domestic substitution programs. The tightening of nuclear safety requirements, localization of nuclear power equipment and rising demand from life extension and outage maintenance have created more opportunities for qualified domestic manufacturers in Class 2 and Class 3 pumps, nuclear valves and auxiliary systems. At the same time, mergers, acquisitions and group based manufacturing are reshaping the industry boundary. Some sealing capabilities are being integrated into larger pump, valve and fluid control groups, while independent seal manufacturers are building closer engineering relationships with equipment OEMs.

Future growth will mainly come from operating plant maintenance, new nuclear build programs, advanced reactor demonstration projects and upgrades in nuclear fuel cycle facilities. Policy support for energy security, low carbon power and nuclear fleet renewal provides a long term demand base, but project approval, nuclear safety review and qualified supplier management will keep the market release rhythm gradual rather than abrupt. Product development will move toward longer service life, lower leakage, stronger corrosion resistance, better fatigue performance, low activation materials and more complete traceable quality documentation. Advanced welding, automated leak testing and digital quality management will further improve manufacturing consistency.

Overall, this is not a fast cycle volume market. It is a steady growth, high barrier nuclear component niche with recurring replacement demand and increasing strategic value in resilient nuclear supply chains.

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

This Insight Report provides a comprehensive analysis of the global Nuclear-grade Metal Bellows Seal Assemblies 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 Nuclear-grade Metal Bellows Seal Assemblies portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Nuclear-grade Metal Bellows Seal Assemblies market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Nuclear-grade Metal Bellows Seal Assemblies 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 Nuclear-grade Metal Bellows Seal Assemblies.

This report presents a comprehensive overview, market shares, and growth opportunities of Nuclear-grade Metal Bellows Seal Assemblies market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Edge Welded Metal Bellows Seals

Formed Metal Bellows Seals

Welded Formed Bellows Seals

Multi Ply Bellows Seals

Others

Segmentation by Material System:

Low Cobalt Stainless Steel Bellows Seals

Nickel Alloy Bellows Seals

Titanium Alloy Bellows Seals

Special Alloy Bellows Seals

Others

Segmentation by Nuclear Safety Class:

Nuclear Safety Class 1 Bellows Seals

Nuclear Safety Class 2 Bellows Seals

Nuclear Safety Class 3 Bellows Seals

Non Safety Class with Nuclear QA Bellows Seals

Others

Segmentation by Application:

Nuclear Valves

Nuclear Pumps

Containment Penetration Components

Nuclear Instrumentation Components

Nuclear Fluid Control Components

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.

Technetics Group

Senior Aerospace Metal Bellows

John Crane

EagleBurgmann

Flowserve Corporation

AESSEAL plc

Flexaseal Engineered Seals and Systems, LLC

Stein Seal Company

Eagle Industry Co., Ltd.

KSM Co., Ltd.

Nanjing Chenguang Dongluo Bellows Co., Ltd.

Shenyang Academy of Instrumentation Science Co., Ltd.

Xi'an Yonghua Group Co., Ltd.

Sinoseal Holding Co., Ltd.

Witzenmann GmbH

Babcock Valves S.A.

Velan Inc.

Microfinish Valves Pvt. Ltd.

AS-Schneider Group

Valcor Engineering Corporation

Key Questions Addressed in this Report

What is the 10-year outlook for the global Nuclear-grade Metal Bellows Seal Assemblies market?

What factors are driving Nuclear-grade Metal Bellows Seal Assemblies market growth, globally and by region?

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

How do Nuclear-grade Metal Bellows Seal Assemblies market opportunities vary by end market size?

How does Nuclear-grade Metal Bellows Seal Assemblies 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 Nuclear-grade Metal Bellows Seal Assemblies Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Nuclear-grade Metal Bellows Seal Assemblies by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Nuclear-grade Metal Bellows Seal Assemblies by Country/Region, 2021, 2025 & 2032

2.2 Nuclear-grade Metal Bellows Seal Assemblies Segment by Type

- 2.2.1 Edge Welded Metal Bellows Seals
- 2.2.2 Formed Metal Bellows Seals
- 2.2.3 Welded Formed Bellows Seals
- 2.2.4 Multi Ply Bellows Seals
- 2.2.5 Others
- 2.2.6 Nuclear-grade Metal Bellows Seal Assemblies Sales by Type
 - 2.2.6.1 Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Type (2021-2026)
 - 2.2.6.2 Global Nuclear-grade Metal Bellows Seal Assemblies Revenue and Market Share by Type (2021-2026)
 - 2.2.6.3 Global Nuclear-grade Metal Bellows Seal Assemblies Sale Price by Type (2021-2026)

2.3 Nuclear-grade Metal Bellows Seal Assemblies Segment by Material System

- 2.3.1 Low Cobalt Stainless Steel Bellows Seals
- 2.3.2 Nickel Alloy Bellows Seals
- 2.3.3 Titanium Alloy Bellows Seals
- 2.3.4 Special Alloy Bellows Seals

2.3.5 Others

2.3.6 Nuclear-grade Metal Bellows Seal Assemblies Sales by Material System

2.3.6.1 Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Material System (2021-2026)

2.3.6.2 Global Nuclear-grade Metal Bellows Seal Assemblies Revenue and Market Share by Material System (2021-2026)

2.3.6.3 Global Nuclear-grade Metal Bellows Seal Assemblies Sale Price by Material System (2021-2026)

2.4 Nuclear-grade Metal Bellows Seal Assemblies Segment by Nuclear Safety Class

2.4.1 Nuclear Safety Class 1 Bellows Seals

2.4.2 Nuclear Safety Class 2 Bellows Seals

2.4.3 Nuclear Safety Class 3 Bellows Seals

2.4.4 Non Safety Class with Nuclear QA Bellows Seals

2.4.5 Others

2.4.6 Nuclear-grade Metal Bellows Seal Assemblies Sales by Nuclear Safety Class

2.4.6.1 Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Nuclear Safety Class (2021-2026)

2.4.6.2 Global Nuclear-grade Metal Bellows Seal Assemblies Revenue and Market Share by Nuclear Safety Class (2021-2026)

2.4.6.3 Global Nuclear-grade Metal Bellows Seal Assemblies Sale Price by Nuclear Safety Class (2021-2026)

2.5 Nuclear-grade Metal Bellows Seal Assemblies Segment by Application

2.5.1 Nuclear Valves

2.5.2 Nuclear Pumps

2.5.3 Containment Penetration Components

2.5.4 Nuclear Instrumentation Components

2.5.5 Nuclear Fluid Control Components

2.5.6 Others

2.5.7 Nuclear-grade Metal Bellows Seal Assemblies Sales by Application

2.5.7.1 Global Nuclear-grade Metal Bellows Seal Assemblies Sale Market Share by Application (2021-2026)

2.5.7.2 Global Nuclear-grade Metal Bellows Seal Assemblies Revenue and Market Share by Application (2021-2026)

2.5.7.3 Global Nuclear-grade Metal Bellows Seal Assemblies Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Nuclear-grade Metal Bellows Seal Assemblies Breakdown Data by Company

3.1.1 Global Nuclear-grade Metal Bellows Seal Assemblies Annual Sales by Company (2021-2026)

3.1.2 Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Company (2021-2026)

3.2 Global Nuclear-grade Metal Bellows Seal Assemblies Annual Revenue by Company (2021-2026)

3.2.1 Global Nuclear-grade Metal Bellows Seal Assemblies Revenue by Company (2021-2026)

3.2.2 Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Company (2021-2026)

3.3 Global Nuclear-grade Metal Bellows Seal Assemblies Sale Price by Company

3.4 Key Manufacturers Nuclear-grade Metal Bellows Seal Assemblies Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Nuclear-grade Metal Bellows Seal Assemblies Product Location Distribution

3.4.2 Players Nuclear-grade Metal Bellows Seal Assemblies 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 NUCLEAR-GRADE METAL BELLOWS SEAL ASSEMBLIES BY GEOGRAPHIC REGION

4.1 World Historic Nuclear-grade Metal Bellows Seal Assemblies Market Size by Geographic Region (2021-2026)

4.1.1 Global Nuclear-grade Metal Bellows Seal Assemblies Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Nuclear-grade Metal Bellows Seal Assemblies Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Nuclear-grade Metal Bellows Seal Assemblies Market Size by Country/Region (2021-2026)

4.2.1 Global Nuclear-grade Metal Bellows Seal Assemblies Annual Sales by Country/Region (2021-2026)

4.2.2 Global Nuclear-grade Metal Bellows Seal Assemblies Annual Revenue by Country/Region (2021-2026)

4.3 Americas Nuclear-grade Metal Bellows Seal Assemblies Sales Growth

4.4 APAC Nuclear-grade Metal Bellows Seal Assemblies Sales Growth

4.5 Europe Nuclear-grade Metal Bellows Seal Assemblies Sales Growth

4.6 Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales Growth

5 AMERICAS

5.1 Americas Nuclear-grade Metal Bellows Seal Assemblies Sales by Country

5.1.1 Americas Nuclear-grade Metal Bellows Seal Assemblies Sales by Country
(2021-2026)

5.1.2 Americas Nuclear-grade Metal Bellows Seal Assemblies Revenue by Country
(2021-2026)

5.2 Americas Nuclear-grade Metal Bellows Seal Assemblies Sales by Type (2021-2026)

5.3 Americas Nuclear-grade Metal Bellows Seal Assemblies Sales by Application
(2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Nuclear-grade Metal Bellows Seal Assemblies Sales by Region

6.1.1 APAC Nuclear-grade Metal Bellows Seal Assemblies Sales by Region
(2021-2026)

6.1.2 APAC Nuclear-grade Metal Bellows Seal Assemblies Revenue by Region
(2021-2026)

6.2 APAC Nuclear-grade Metal Bellows Seal Assemblies Sales by Type (2021-2026)

6.3 APAC Nuclear-grade Metal Bellows Seal Assemblies 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 Nuclear-grade Metal Bellows Seal Assemblies by Country

7.1.1 Europe Nuclear-grade Metal Bellows Seal Assemblies Sales by Country (2021-2026)

7.1.2 Europe Nuclear-grade Metal Bellows Seal Assemblies Revenue by Country (2021-2026)

7.2 Europe Nuclear-grade Metal Bellows Seal Assemblies Sales by Type (2021-2026)

7.3 Europe Nuclear-grade Metal Bellows Seal Assemblies 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 Nuclear-grade Metal Bellows Seal Assemblies by Country

8.1.1 Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales by Country (2021-2026)

8.1.2 Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Revenue by Country (2021-2026)

8.2 Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales by Type (2021-2026)

8.3 Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies 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 Nuclear-grade Metal Bellows Seal Assemblies

10.3 Manufacturing Process Analysis of Nuclear-grade Metal Bellows Seal Assemblies

10.4 Industry Chain Structure of Nuclear-grade Metal Bellows Seal Assemblies

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Nuclear-grade Metal Bellows Seal Assemblies Distributors

11.3 Nuclear-grade Metal Bellows Seal Assemblies Customer

12 WORLD FORECAST REVIEW FOR NUCLEAR-GRADE METAL BELLOWS SEAL ASSEMBLIES BY GEOGRAPHIC REGION

12.1 Global Nuclear-grade Metal Bellows Seal Assemblies Market Size Forecast by Region

12.1.1 Global Nuclear-grade Metal Bellows Seal Assemblies Forecast by Region (2027-2032)

12.1.2 Global Nuclear-grade Metal Bellows Seal Assemblies 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 Nuclear-grade Metal Bellows Seal Assemblies Forecast by Type (2027-2032)

12.7 Global Nuclear-grade Metal Bellows Seal Assemblies Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Technetix Group

13.1.1 Technetix Group Company Information

13.1.2 Technetix Group Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

13.1.3 Technetix Group Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.1.4 Technetics Group Main Business Overview
- 13.1.5 Technetics Group Latest Developments
- 13.2 Senior Aerospace Metal Bellows
 - 13.2.1 Senior Aerospace Metal Bellows Company Information
 - 13.2.2 Senior Aerospace Metal Bellows Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications
 - 13.2.3 Senior Aerospace Metal Bellows Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 Senior Aerospace Metal Bellows Main Business Overview
 - 13.2.5 Senior Aerospace Metal Bellows Latest Developments
- 13.3 John Crane
 - 13.3.1 John Crane Company Information
 - 13.3.2 John Crane Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications
 - 13.3.3 John Crane Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 John Crane Main Business Overview
 - 13.3.5 John Crane Latest Developments
- 13.4 EagleBurgmann
 - 13.4.1 EagleBurgmann Company Information
 - 13.4.2 EagleBurgmann Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications
 - 13.4.3 EagleBurgmann Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 EagleBurgmann Main Business Overview
 - 13.4.5 EagleBurgmann Latest Developments
- 13.5 Flowserve Corporation
 - 13.5.1 Flowserve Corporation Company Information
 - 13.5.2 Flowserve Corporation Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications
 - 13.5.3 Flowserve Corporation Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Flowserve Corporation Main Business Overview
 - 13.5.5 Flowserve Corporation Latest Developments
- 13.6 AESSEAL plc
 - 13.6.1 AESSEAL plc Company Information
 - 13.6.2 AESSEAL plc Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications
 - 13.6.3 AESSEAL plc Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue,

Price and Gross Margin (2021-2026)

13.6.4 AESSEAL plc Main Business Overview

13.6.5 AESSEAL plc Latest Developments

13.7 Flexaseal Engineered Seals and Systems, LLC

13.7.1 Flexaseal Engineered Seals and Systems, LLC Company Information

13.7.2 Flexaseal Engineered Seals and Systems, LLC Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

13.7.3 Flexaseal Engineered Seals and Systems, LLC Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Flexaseal Engineered Seals and Systems, LLC Main Business Overview

13.7.5 Flexaseal Engineered Seals and Systems, LLC Latest Developments

13.8 Stein Seal Company

13.8.1 Stein Seal Company Company Information

13.8.2 Stein Seal Company Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

13.8.3 Stein Seal Company Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Stein Seal Company Main Business Overview

13.8.5 Stein Seal Company Latest Developments

13.9 Eagle Industry Co., Ltd.

13.9.1 Eagle Industry Co., Ltd. Company Information

13.9.2 Eagle Industry Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

13.9.3 Eagle Industry Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Eagle Industry Co., Ltd. Main Business Overview

13.9.5 Eagle Industry Co., Ltd. Latest Developments

13.10 KSM Co., Ltd.

13.10.1 KSM Co., Ltd. Company Information

13.10.2 KSM Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

13.10.3 KSM Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 KSM Co., Ltd. Main Business Overview

13.10.5 KSM Co., Ltd. Latest Developments

13.11 Nanjing Chenguang Dongluo Bellows Co., Ltd.

13.11.1 Nanjing Chenguang Dongluo Bellows Co., Ltd. Company Information

13.11.2 Nanjing Chenguang Dongluo Bellows Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

13.11.3 Nanjing Chenguang Dongluo Bellows Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Nanjing Chenguang Dongluo Bellows Co., Ltd. Main Business Overview

13.11.5 Nanjing Chenguang Dongluo Bellows Co., Ltd. Latest Developments

13.12 Shenyang Academy of Instrumentation Science Co., Ltd.

13.12.1 Shenyang Academy of Instrumentation Science Co., Ltd. Company Information

13.12.2 Shenyang Academy of Instrumentation Science Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

13.12.3 Shenyang Academy of Instrumentation Science Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Shenyang Academy of Instrumentation Science Co., Ltd. Main Business Overview

13.12.5 Shenyang Academy of Instrumentation Science Co., Ltd. Latest Developments

13.13 Xi'an Yonghua Group Co., Ltd.

13.13.1 Xi'an Yonghua Group Co., Ltd. Company Information

13.13.2 Xi'an Yonghua Group Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

13.13.3 Xi'an Yonghua Group Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Xi'an Yonghua Group Co., Ltd. Main Business Overview

13.13.5 Xi'an Yonghua Group Co., Ltd. Latest Developments

13.14 Sinoseal Holding Co., Ltd.

13.14.1 Sinoseal Holding Co., Ltd. Company Information

13.14.2 Sinoseal Holding Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

13.14.3 Sinoseal Holding Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Sinoseal Holding Co., Ltd. Main Business Overview

13.14.5 Sinoseal Holding Co., Ltd. Latest Developments

13.15 Witzenmann GmbH

13.15.1 Witzenmann GmbH Company Information

13.15.2 Witzenmann GmbH Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

13.15.3 Witzenmann GmbH Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Witzenmann GmbH Main Business Overview

13.15.5 Witzenmann GmbH Latest Developments

13.16 Babcock Valves S.A.

- 13.16.1 Babcock Valves S.A. Company Information
- 13.16.2 Babcock Valves S.A. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications
- 13.16.3 Babcock Valves S.A. Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.16.4 Babcock Valves S.A. Main Business Overview
- 13.16.5 Babcock Valves S.A. Latest Developments
- 13.17 Velan Inc.
 - 13.17.1 Velan Inc. Company Information
 - 13.17.2 Velan Inc. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications
 - 13.17.3 Velan Inc. Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.17.4 Velan Inc. Main Business Overview
 - 13.17.5 Velan Inc. Latest Developments
- 13.18 Microfinish Valves Pvt. Ltd.
 - 13.18.1 Microfinish Valves Pvt. Ltd. Company Information
 - 13.18.2 Microfinish Valves Pvt. Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications
 - 13.18.3 Microfinish Valves Pvt. Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 Microfinish Valves Pvt. Ltd. Main Business Overview
 - 13.18.5 Microfinish Valves Pvt. Ltd. Latest Developments
- 13.19 AS-Schneider Group
 - 13.19.1 AS-Schneider Group Company Information
 - 13.19.2 AS-Schneider Group Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications
 - 13.19.3 AS-Schneider Group Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 AS-Schneider Group Main Business Overview
 - 13.19.5 AS-Schneider Group Latest Developments
- 13.20 Valcor Engineering Corporation
 - 13.20.1 Valcor Engineering Corporation Company Information
 - 13.20.2 Valcor Engineering Corporation Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications
 - 13.20.3 Valcor Engineering Corporation Nuclear-grade Metal Bellows Seal Assemblies Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 Valcor Engineering Corporation Main Business Overview
 - 13.20.5 Valcor Engineering Corporation Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Nuclear-grade Metal Bellows Seal Assemblies Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Nuclear-grade Metal Bellows Seal Assemblies Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Edge Welded Metal Bellows Seals

Table 4. Major Players of Formed Metal Bellows Seals

Table 5. Major Players of Welded Formed Bellows Seals

Table 6. Major Players of Multi Ply Bellows Seals

Table 7. Major Players of Others

Table 8. Global Nuclear-grade Metal Bellows Seal Assemblies Sales by Type (2021-2026) & (K Units)

Table 9. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Type (2021-2026)

Table 10. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue by Type (2021-2026) & (\$ million)

Table 11. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Type (2021-2026)

Table 12. Global Nuclear-grade Metal Bellows Seal Assemblies Sale Price by Type (2021-2026) & (K US\$/Unit)

Table 13. Major Players of Low Cobalt Stainless Steel Bellows Seals

Table 14. Major Players of Nickel Alloy Bellows Seals

Table 15. Major Players of Titanium Alloy Bellows Seals

Table 16. Major Players of Special Alloy Bellows Seals

Table 17. Major Players of Others

Table 18. Global Nuclear-grade Metal Bellows Seal Assemblies Sales by Material System (2021-2026) & (K Units)

Table 19. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Material System (2021-2026)

Table 20. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue by Material System (2021-2026) & (\$ million)

Table 21. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Material System (2021-2026)

Table 22. Global Nuclear-grade Metal Bellows Seal Assemblies Sale Price by Material System (2021-2026) & (K US\$/Unit)

Table 23. Major Players of Nuclear Safety Class 1 Bellows Seals

Table 24. Major Players of Nuclear Safety Class 2 Bellows Seals
Table 25. Major Players of Nuclear Safety Class 3 Bellows Seals
Table 26. Major Players of Non Safety Class with Nuclear QA Bellows Seals
Table 27. Major Players of Others
Table 28. Global Nuclear-grade Metal Bellows Seal Assemblies Sales by Nuclear Safety Class (2021-2026) & (K Units)
Table 29. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Nuclear Safety Class (2021-2026)
Table 30. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue by Nuclear Safety Class (2021-2026) & (\$ million)
Table 31. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Nuclear Safety Class (2021-2026)
Table 32. Global Nuclear-grade Metal Bellows Seal Assemblies Sale Price by Nuclear Safety Class (2021-2026) & (K US\$/Unit)
Table 33. Global Nuclear-grade Metal Bellows Seal Assemblies Sale by Application (2021-2026) & (K Units)
Table 34. Global Nuclear-grade Metal Bellows Seal Assemblies Sale Market Share by Application (2021-2026)
Table 35. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue by Application (2021-2026) & (\$ million)
Table 36. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Application (2021-2026)
Table 37. Global Nuclear-grade Metal Bellows Seal Assemblies Sale Price by Application (2021-2026) & (K US\$/Unit)
Table 38. Global Nuclear-grade Metal Bellows Seal Assemblies Sales by Company (2021-2026) & (K Units)
Table 39. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Company (2021-2026)
Table 40. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue by Company (2021-2026) & (\$ millions)
Table 41. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Company (2021-2026)
Table 42. Global Nuclear-grade Metal Bellows Seal Assemblies Sale Price by Company (2021-2026) & (K US\$/Unit)
Table 43. Key Manufacturers Nuclear-grade Metal Bellows Seal Assemblies Producing Area Distribution and Sales Area
Table 44. Players Nuclear-grade Metal Bellows Seal Assemblies Products Offered
Table 45. Nuclear-grade Metal Bellows Seal Assemblies Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 46. New Products and Potential Entrants

Table 47. Market M&A Activity & Strategy

Table 48. Global Nuclear-grade Metal Bellows Seal Assemblies Sales by Geographic Region (2021-2026) & (K Units)

Table 49. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share Geographic Region (2021-2026)

Table 50. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 51. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Geographic Region (2021-2026)

Table 52. Global Nuclear-grade Metal Bellows Seal Assemblies Sales by Country/Region (2021-2026) & (K Units)

Table 53. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Country/Region (2021-2026)

Table 54. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue by Country/Region (2021-2026) & (\$ millions)

Table 55. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Country/Region (2021-2026)

Table 56. Americas Nuclear-grade Metal Bellows Seal Assemblies Sales by Country (2021-2026) & (K Units)

Table 57. Americas Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Country (2021-2026)

Table 58. Americas Nuclear-grade Metal Bellows Seal Assemblies Revenue by Country (2021-2026) & (\$ millions)

Table 59. Americas Nuclear-grade Metal Bellows Seal Assemblies Sales by Type (2021-2026) & (K Units)

Table 60. Americas Nuclear-grade Metal Bellows Seal Assemblies Sales by Application (2021-2026) & (K Units)

Table 61. APAC Nuclear-grade Metal Bellows Seal Assemblies Sales by Region (2021-2026) & (K Units)

Table 62. APAC Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Region (2021-2026)

Table 63. APAC Nuclear-grade Metal Bellows Seal Assemblies Revenue by Region (2021-2026) & (\$ millions)

Table 64. APAC Nuclear-grade Metal Bellows Seal Assemblies Sales by Type (2021-2026) & (K Units)

Table 65. APAC Nuclear-grade Metal Bellows Seal Assemblies Sales by Application (2021-2026) & (K Units)

Table 66. Europe Nuclear-grade Metal Bellows Seal Assemblies Sales by Country

(2021-2026) & (K Units)

Table 67. Europe Nuclear-grade Metal Bellows Seal Assemblies Revenue by Country (2021-2026) & (\$ millions)

Table 68. Europe Nuclear-grade Metal Bellows Seal Assemblies Sales by Type (2021-2026) & (K Units)

Table 69. Europe Nuclear-grade Metal Bellows Seal Assemblies Sales by Application (2021-2026) & (K Units)

Table 70. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales by Country (2021-2026) & (K Units)

Table 71. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Country (2021-2026)

Table 72. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales by Type (2021-2026) & (K Units)

Table 73. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales by Application (2021-2026) & (K Units)

Table 74. Key Market Drivers & Growth Opportunities of Nuclear-grade Metal Bellows Seal Assemblies

Table 75. Key Market Challenges & Risks of Nuclear-grade Metal Bellows Seal Assemblies

Table 76. Key Industry Trends of Nuclear-grade Metal Bellows Seal Assemblies

Table 77. Nuclear-grade Metal Bellows Seal Assemblies Raw Material

Table 78. Key Suppliers of Raw Materials

Table 79. Nuclear-grade Metal Bellows Seal Assemblies Distributors List

Table 80. Nuclear-grade Metal Bellows Seal Assemblies Customer List

Table 81. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Forecast by Region (2027-2032) & (K Units)

Table 82. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 83. Americas Nuclear-grade Metal Bellows Seal Assemblies Sales Forecast by Country (2027-2032) & (K Units)

Table 84. Americas Nuclear-grade Metal Bellows Seal Assemblies Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. APAC Nuclear-grade Metal Bellows Seal Assemblies Sales Forecast by Region (2027-2032) & (K Units)

Table 86. APAC Nuclear-grade Metal Bellows Seal Assemblies Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 87. Europe Nuclear-grade Metal Bellows Seal Assemblies Sales Forecast by Country (2027-2032) & (K Units)

Table 88. Europe Nuclear-grade Metal Bellows Seal Assemblies Revenue Forecast by

Country (2027-2032) & (\$ millions)

Table 89. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales Forecast by Country (2027-2032) & (K Units)

Table 90. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 91. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Forecast by Type (2027-2032) & (K Units)

Table 92. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 93. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Forecast by Application (2027-2032) & (K Units)

Table 94. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 95. Technetics Group Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 96. Technetics Group Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 97. Technetics Group Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 98. Technetics Group Main Business

Table 99. Technetics Group Latest Developments

Table 100. Senior Aerospace Metal Bellows Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 101. Senior Aerospace Metal Bellows Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 102. Senior Aerospace Metal Bellows Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 103. Senior Aerospace Metal Bellows Main Business

Table 104. Senior Aerospace Metal Bellows Latest Developments

Table 105. John Crane Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 106. John Crane Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 107. John Crane Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 108. John Crane Main Business

Table 109. John Crane Latest Developments

Table 110. EagleBurgmann Basic Information, Nuclear-grade Metal Bellows Seal

Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 111. EagleBurgmann Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 112. EagleBurgmann Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 113. EagleBurgmann Main Business

Table 114. EagleBurgmann Latest Developments

Table 115. Flowserve Corporation Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 116. Flowserve Corporation Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 117. Flowserve Corporation Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 118. Flowserve Corporation Main Business

Table 119. Flowserve Corporation Latest Developments

Table 120. AESSEAL plc Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 121. AESSEAL plc Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 122. AESSEAL plc Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 123. AESSEAL plc Main Business

Table 124. AESSEAL plc Latest Developments

Table 125. Flexaseal Engineered Seals and Systems, LLC Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 126. Flexaseal Engineered Seals and Systems, LLC Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 127. Flexaseal Engineered Seals and Systems, LLC Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 128. Flexaseal Engineered Seals and Systems, LLC Main Business

Table 129. Flexaseal Engineered Seals and Systems, LLC Latest Developments

Table 130. Stein Seal Company Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 131. Stein Seal Company Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 132. Stein Seal Company Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 133. Stein Seal Company Main Business

Table 134. Stein Seal Company Latest Developments

Table 135. Eagle Industry Co., Ltd. Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 136. Eagle Industry Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 137. Eagle Industry Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 138. Eagle Industry Co., Ltd. Main Business

Table 139. Eagle Industry Co., Ltd. Latest Developments

Table 140. KSM Co., Ltd. Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 141. KSM Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 142. KSM Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 143. KSM Co., Ltd. Main Business

Table 144. KSM Co., Ltd. Latest Developments

Table 145. Nanjing Chenguang Dongluo Bellows Co., Ltd. Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 146. Nanjing Chenguang Dongluo Bellows Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 147. Nanjing Chenguang Dongluo Bellows Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 148. Nanjing Chenguang Dongluo Bellows Co., Ltd. Main Business

Table 149. Nanjing Chenguang Dongluo Bellows Co., Ltd. Latest Developments

Table 150. Shenyang Academy of Instrumentation Science Co., Ltd. Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 151. Shenyang Academy of Instrumentation Science Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 152. Shenyang Academy of Instrumentation Science Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 153. Shenyang Academy of Instrumentation Science Co., Ltd. Main Business

Table 154. Shenyang Academy of Instrumentation Science Co., Ltd. Latest Developments

Table 155. Xi'an Yonghua Group Co., Ltd. Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 156. Xi'an Yonghua Group Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 157. Xi'an Yonghua Group Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 158. Xi'an Yonghua Group Co., Ltd. Main Business

Table 159. Xi'an Yonghua Group Co., Ltd. Latest Developments

Table 160. Sinoseal Holding Co., Ltd. Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 161. Sinoseal Holding Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 162. Sinoseal Holding Co., Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 163. Sinoseal Holding Co., Ltd. Main Business

Table 164. Sinoseal Holding Co., Ltd. Latest Developments

Table 165. Witzenmann GmbH Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 166. Witzenmann GmbH Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 167. Witzenmann GmbH Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 168. Witzenmann GmbH Main Business

Table 169. Witzenmann GmbH Latest Developments

Table 170. Babcock Valves S.A. Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 171. Babcock Valves S.A. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 172. Babcock Valves S.A. Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 173. Babcock Valves S.A. Main Business

Table 174. Babcock Valves S.A. Latest Developments

Table 175. Velan Inc. Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 176. Velan Inc. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 177. Velan Inc. Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 178. Velan Inc. Main Business

Table 179. Velan Inc. Latest Developments

Table 180. Microfinish Valves Pvt. Ltd. Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 181. Microfinish Valves Pvt. Ltd. Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 182. Microfinish Valves Pvt. Ltd. Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 183. Microfinish Valves Pvt. Ltd. Main Business

Table 184. Microfinish Valves Pvt. Ltd. Latest Developments

Table 185. AS-Schneider Group Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 186. AS-Schneider Group Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 187. AS-Schneider Group Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 188. AS-Schneider Group Main Business

Table 189. AS-Schneider Group Latest Developments

Table 190. Valcor Engineering Corporation Basic Information, Nuclear-grade Metal Bellows Seal Assemblies Manufacturing Base, Sales Area and Its Competitors

Table 191. Valcor Engineering Corporation Nuclear-grade Metal Bellows Seal Assemblies Product Portfolios and Specifications

Table 192. Valcor Engineering Corporation Nuclear-grade Metal Bellows Seal Assemblies Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 193. Valcor Engineering Corporation Main Business

Table 194. Valcor Engineering Corporation Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Nuclear-grade Metal Bellows Seal Assemblies
- Figure 2. Nuclear-grade Metal Bellows Seal Assemblies Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Nuclear-grade Metal Bellows Seal Assemblies Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Country/Region (2025)
- Figure 10. Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Edge Welded Metal Bellows Seals
- Figure 12. Product Picture of Formed Metal Bellows Seals
- Figure 13. Product Picture of Welded Formed Bellows Seals
- Figure 14. Product Picture of Multi Ply Bellows Seals
- Figure 15. Product Picture of Others
- Figure 16. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Type in 2026
- Figure 17. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Type (2021-2026)
- Figure 18. Product Picture of Low Cobalt Stainless Steel Bellows Seals
- Figure 19. Product Picture of Nickel Alloy Bellows Seals
- Figure 20. Product Picture of Titanium Alloy Bellows Seals
- Figure 21. Product Picture of Special Alloy Bellows Seals
- Figure 22. Product Picture of Others
- Figure 23. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Material System in 2026
- Figure 24. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Material System (2021-2026)
- Figure 25. Product Picture of Nuclear Safety Class 1 Bellows Seals
- Figure 26. Product Picture of Nuclear Safety Class 2 Bellows Seals

Figure 27. Product Picture of Nuclear Safety Class 3 Bellows Seals

Figure 28. Product Picture of Non Safety Class with Nuclear QA Bellows Seals

Figure 29. Product Picture of Others

Figure 30. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Nuclear Safety Class in 2026

Figure 31. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Nuclear Safety Class (2021-2026)

Figure 32. Nuclear-grade Metal Bellows Seal Assemblies Consumed in Nuclear Valves

Figure 33. Global Nuclear-grade Metal Bellows Seal Assemblies Market: Nuclear Valves (2021-2026) & (K Units)

Figure 34. Nuclear-grade Metal Bellows Seal Assemblies Consumed in Nuclear Pumps

Figure 35. Global Nuclear-grade Metal Bellows Seal Assemblies Market: Nuclear Pumps (2021-2026) & (K Units)

Figure 36. Nuclear-grade Metal Bellows Seal Assemblies Consumed in Containment Penetration Components

Figure 37. Global Nuclear-grade Metal Bellows Seal Assemblies Market: Containment Penetration Components (2021-2026) & (K Units)

Figure 38. Nuclear-grade Metal Bellows Seal Assemblies Consumed in Nuclear Instrumentation Components

Figure 39. Global Nuclear-grade Metal Bellows Seal Assemblies Market: Nuclear Instrumentation Components (2021-2026) & (K Units)

Figure 40. Nuclear-grade Metal Bellows Seal Assemblies Consumed in Nuclear Fluid Control Components

Figure 41. Global Nuclear-grade Metal Bellows Seal Assemblies Market: Nuclear Fluid Control Components (2021-2026) & (K Units)

Figure 42. Nuclear-grade Metal Bellows Seal Assemblies Consumed in Others

Figure 43. Global Nuclear-grade Metal Bellows Seal Assemblies Market: Others (2021-2026) & (K Units)

Figure 44. Global Nuclear-grade Metal Bellows Seal Assemblies Sale Market Share by Application (2025)

Figure 45. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Application in 2025

Figure 46. Nuclear-grade Metal Bellows Seal Assemblies Sales by Company in 2025 (K Units)

Figure 47. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Company in 2025

Figure 48. Nuclear-grade Metal Bellows Seal Assemblies Revenue by Company in 2025 (\$ millions)

Figure 49. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share

by Company in 2025

Figure 50. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Geographic Region (2021-2026)

Figure 51. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Geographic Region in 2025

Figure 52. Americas Nuclear-grade Metal Bellows Seal Assemblies Sales 2021-2026 (K Units)

Figure 53. Americas Nuclear-grade Metal Bellows Seal Assemblies Revenue 2021-2026 (\$ millions)

Figure 54. APAC Nuclear-grade Metal Bellows Seal Assemblies Sales 2021-2026 (K Units)

Figure 55. APAC Nuclear-grade Metal Bellows Seal Assemblies Revenue 2021-2026 (\$ millions)

Figure 56. Europe Nuclear-grade Metal Bellows Seal Assemblies Sales 2021-2026 (K Units)

Figure 57. Europe Nuclear-grade Metal Bellows Seal Assemblies Revenue 2021-2026 (\$ millions)

Figure 58. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales 2021-2026 (K Units)

Figure 59. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Revenue 2021-2026 (\$ millions)

Figure 60. Americas Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Country in 2025

Figure 61. Americas Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Country (2021-2026)

Figure 62. Americas Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Type (2021-2026)

Figure 63. Americas Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Application (2021-2026)

Figure 64. United States Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 65. Canada Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 66. Mexico Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 67. Brazil Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 68. APAC Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Region in 2025

Figure 69. APAC Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Region (2021-2026)

Figure 70. APAC Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Type (2021-2026)

Figure 71. APAC Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Application (2021-2026)

Figure 72. China Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 73. Japan Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 74. South Korea Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 75. Southeast Asia Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 76. India Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 77. Australia Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 78. China Taiwan Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 79. Europe Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Country in 2025

Figure 80. Europe Nuclear-grade Metal Bellows Seal Assemblies Revenue Market Share by Country (2021-2026)

Figure 81. Europe Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Type (2021-2026)

Figure 82. Europe Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share by Application (2021-2026)

Figure 83. Germany Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 84. France Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 85. UK Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 86. Italy Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 87. Russia Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth 2021-2026 (\$ millions)

Figure 88. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales

Market Share by Country (2021-2026)

Figure 89. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales

Market Share by Type (2021-2026)

Figure 90. Middle East & Africa Nuclear-grade Metal Bellows Seal Assemblies Sales

Market Share by Application (2021-2026)

Figure 91. Egypt Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth
2021-2026 (\$ millions)

Figure 92. South Africa Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth
2021-2026 (\$ millions)

Figure 93. Israel Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth
2021-2026 (\$ millions)

Figure 94. Turkey Nuclear-grade Metal Bellows Seal Assemblies Revenue Growth
2021-2026 (\$ millions)

Figure 95. GCC Countries Nuclear-grade Metal Bellows Seal Assemblies Revenue
Growth 2021-2026 (\$ millions)

Figure 96. Manufacturing Cost Structure Analysis of Nuclear-grade Metal Bellows Seal
Assemblies in 2026

Figure 97. Manufacturing Process Analysis of Nuclear-grade Metal Bellows Seal
Assemblies

Figure 98. Industry Chain Structure of Nuclear-grade Metal Bellows Seal Assemblies

Figure 99. Channels of Distribution

Figure 100. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market
Forecast by Region (2027-2032)

Figure 101. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market
Share Forecast by Region (2027-2032)

Figure 102. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share
Forecast by Type (2027-2032)

Figure 103. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market
Share Forecast by Type (2027-2032)

Figure 104. Global Nuclear-grade Metal Bellows Seal Assemblies Sales Market Share
Forecast by Application (2027-2032)

Figure 105. Global Nuclear-grade Metal Bellows Seal Assemblies Revenue Market
Share Forecast by Application (2027-2032)

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