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Global Nuclear Power Reactor Coolant Pumps Market Growth 2026-2032

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Abstracts

The global Nuclear Power Reactor Coolant Pumps market size is predicted to grow from US$ 279 million in 2025 to US$ 402 million in 2032; it is expected to grow at a CAGR of 5.5% from 2026 to 2032.

Nuclear Power Reactor Coolant Pumps are safety-critical pumping equipment used to maintain controlled circulation of reactor coolant and transfer thermal energy generated in the reactor core through the primary cooling system. The equipment is engineered for long-duration operation under high-temperature, high-pressure and, depending on reactor configuration, radiation-intensive conditions, with particularly stringent requirements for hydraulic stability, structural integrity, sealing performance, vibration control, material compatibility and operational reliability. This study covers Motor-Driven RCP and Turbine-Driven RCP configurations used in nuclear power generation, nuclear power plant operation and maintenance, research and experimental facilities, and other qualified nuclear applications. Key engineering parameters include rated flow capacity, discharge head, operating pressure and temperature, rotational speed, drive-system characteristics, shaft and bearing design, sealing architecture, materials, vibration performance and applicable nuclear-grade qualification requirements. In commercial nuclear power plants, Nuclear Power Reactor Coolant Pumps form an integral part of reactor cooling systems and directly support stable heat transfer, unit availability and safe reactor operation.

Key Findings

Nuclear Power Reactor Coolant Pumps are safety-critical equipment with exceptionally high reliability and qualification requirements

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Motor-driven configurations remain the principal technical route for commercial reactor coolant circulation

New nuclear construction and life-extension programs jointly support equipment demand

Operation and maintenance creates recurring demand for refurbishment replacement parts and technical services

Competition is centered on nuclear-grade engineering qualification operating references and lifecycle support

Market Trends

The Nuclear Power Reactor Coolant Pumps industry is moving toward higher reliability, longer maintenance intervals, improved hydraulic efficiency and stronger lifecycle maintainability. Nuclear power plant operators increasingly evaluate reactor coolant pumps not only by initial hydraulic performance, but also by seal life, vibration stability, inspection accessibility, component replacement time and long-term operating availability. Product development is therefore placing greater emphasis on optimized hydraulic structures, improved shaft and sealing systems, advanced materials, enhanced bearing performance, condition monitoring and maintenance-friendly design. At the same time, longer operating cycles and higher capacity-factor requirements are increasing the importance of continuous-duty reliability and reducing tolerance for unplanned outages. New-generation nuclear power projects are also creating demand for pump designs adapted to different reactor layouts, system integration approaches and reliability requirements, gradually shifting industry development from single-equipment performance optimization toward whole-lifecycle reliability and serviceability.

Market Dynamics

Drivers

The principal demand driver for Nuclear Power Reactor Coolant Pumps is the continued construction, operation and life extension of nuclear power plants. Reactor cooling systems require highly reliable circulation equipment capable of continuous operation under demanding thermal and pressure conditions, making reactor coolant pumps critical equipment in nuclear power generation. New reactor projects generate original-equipment demand, while the large installed base of operating nuclear power plants

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supports replacement, overhaul, refurbishment and spare-parts requirements. Plant life-extension programs further stimulate demand for upgraded components and engineering services as operators seek to improve reliability, reduce maintenance duration and maintain long-term operating performance.

Restraints

The market is constrained by exceptionally high technical, regulatory and manufacturing barriers. Nuclear Power Reactor Coolant Pumps require specialized engineering, nuclear-grade materials, precision manufacturing, strict quality assurance and extensive testing and qualification procedures. Customer approval and certification cycles are significantly longer than those for conventional industrial pumps, while individual project volumes remain limited and closely tied to nuclear power plant construction, licensing and commissioning schedules. Long project cycles, high fixed engineering costs and the need to maintain specialized production and testing capacity can create pressure on capacity utilization and cost efficiency.

Opportunities

Future market opportunities are concentrated in nuclear fleet life extension, aging-equipment replacement, localization of nuclear equipment supply chains and development of new reactor technologies. Operating nuclear power plants create recurring requirements for seal systems, bearings, hydraulic components, motors, shafts and other critical parts, as well as complete pump refurbishment and performance upgrades. At the same time, new nuclear construction in selected markets provides opportunities for original equipment suppliers, particularly those capable of adapting pump architecture and drive systems to different reactor designs. The increasing emphasis on local nuclear manufacturing and long-term service capability also creates opportunities for suppliers that can combine engineering localization, qualified manufacturing and lifecycle maintenance support.

Challenges

A major long-term challenge is maintaining nuclear-grade manufacturing capability and experienced engineering resources across uneven project cycles. Suppliers must preserve qualified processes, material traceability systems, specialized testing infrastructure and engineering know-how even when new-build orders fluctuate. Nuclear plant operators also require extremely low failure probability and long operating life, meaning that design changes and new technologies generally require extensive validation before adoption. Differences in reactor technologies, customer specifications

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and national nuclear safety requirements further increase engineering complexity and limit product standardization, while project delays or changes in nuclear investment schedules can directly affect order timing.

Industry Chain Analysis

The upstream industry chain for Nuclear Power Reactor Coolant Pumps includes nuclear-grade forged and cast components, stainless and specialty alloy materials, electric motors or other qualified drive systems, shafts, bearings, sealing systems, hydraulic components, instrumentation and monitoring devices. Precision forging, casting, machining, welding, heat treatment and nondestructive examination are critical manufacturing processes. Because reactor coolant pumps operate continuously under severe thermal and pressure conditions, material integrity, dimensional accuracy, fatigue resistance and full traceability are fundamental to product reliability. Specialized testing facilities are also required to verify hydraulic performance, vibration characteristics, sealing behavior and structural integrity before equipment delivery.

The midstream covers pump-system engineering, hydraulic design, mechanical design, drive-system integration, manufacturing, assembly, nuclear-grade inspection, testing and qualification. Value creation is concentrated in engineering capability, nuclear quality-management systems, accumulated operating references and lifecycle service expertise. Downstream demand comes from nuclear power generation, nuclear power plant operation and maintenance, research and experimental applications, and other qualified nuclear uses. Compared with conventional industrial pumps, a larger share of lifecycle value can be generated after initial installation through spare parts, scheduled inspection, component replacement, refurbishment, performance improvement and technical support over the multidecade operating life of a nuclear power plant.

Segment Insights

By drive configuration, the confirmed product scope consists of Motor-Driven RCP and Turbine-Driven RCP. Motor-Driven RCP represents the principal configuration in commercial reactor coolant circulation systems, where stable high-flow operation, continuous-duty reliability and integration with plant electrical systems are critical. Technical differentiation is concentrated on motor reliability, shaft alignment, bearing performance, sealing life, vibration control and long-term availability. Turbine-Driven RCP is applied according to specific reactor-system or plant-engineering requirements, with product selection depending on overall system architecture, operating strategy and required drive characteristics.

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From a parameter perspective, rated flow capacity is one of the core indicators determining pump specification. Different reactor power classes and cooling-system architectures require different coolant circulation volumes, which in turn affect hydraulic structure, impeller dimensions, shaft loads, drive power and overall equipment configuration. Higher flow requirements therefore do not simply translate into larger pumps, but require a coordinated balance among hydraulic efficiency, cavitation margin, vibration performance, structural strength and long-term reliability, making system-level engineering capability an important source of differentiation.

Downstream Market Opportunities

Nuclear Power Generation remains the fundamental downstream market for Nuclear Power Reactor Coolant Pumps, with demand directly associated with new reactor construction and reactor cooling-system configuration. Nuclear Power Plant Operation and Maintenance represents an important recurring market because installed pumps require periodic inspection, replacement of wear-sensitive components, refurbishment and performance verification throughout plant life. Research and Experiment applications are smaller in scale but typically feature more differentiated technical requirements according to reactor power, coolant medium and experimental objectives. The coexistence of new-build nuclear projects and aging operating fleets therefore creates two complementary demand streams: original equipment for new reactors and lifecycle service demand for the installed base.

Regional Insights

Asia-Pacific is one of the most strategically important regions for Nuclear Power Reactor Coolant Pumps because it combines active nuclear construction, expanding localization of nuclear equipment supply chains and a substantial operating reactor base. China, South Korea and Japan possess significant nuclear engineering and equipment-manufacturing capabilities, while ongoing reactor projects and localization programs continue to support demand for qualified reactor coolant pump suppliers. Regional procurement increasingly emphasizes domestic manufacturing capability, nuclear-grade qualification and long-term service support, making localization an increasingly important competitive factor.

North America and Europe are mature but strategically significant markets characterized by large installed reactor fleets, plant life-extension programs and continuing demand for replacement and refurbishment. The United States supports

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substantial aftermarket activity through its operating reactor base, while France and other European markets maintain mature nuclear engineering and service ecosystems. Russia also retains established reactor and nuclear-equipment manufacturing capabilities. Regional market structures therefore differ considerably: markets with active new-build programs provide stronger original-equipment opportunities, while mature nuclear fleets generate more stable demand for maintenance, refurbishment, component replacement and life-extension services.

Competitive Landscape Analysis

The Nuclear Power Reactor Coolant Pumps market is characterized by high entry barriers, a relatively concentrated base of qualified suppliers and strong dependence on long-term operating references. Competition is driven less by conventional pump pricing and more by nuclear-grade engineering capability, product qualification, reliability, specialized manufacturing and testing infrastructure, project execution experience and lifecycle service capacity. Established suppliers benefit from accumulated operating records, mature nuclear quality-management systems and long-standing relationships with reactor technology providers and nuclear utilities, while new entrants face lengthy certification cycles and stringent requirements for material traceability, manufacturing consistency and safety performance. As global nuclear demand increasingly combines new-build projects, plant life extension and equipment modernization, competitive differentiation is gradually shifting toward the ability to provide integrated original equipment, replacement components, refurbishment, technical upgrades and long-term maintenance support across the full operating life of nuclear power plants.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Nuclear Power Reactor Coolant Pumps 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

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a focus on Nuclear Power Reactor Coolant Pumps portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Nuclear Power Reactor Coolant Pumps market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Nuclear Power Reactor Coolant Pumps 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 Power Reactor Coolant Pumps.

This report presents a comprehensive overview, market shares, and growth opportunities of Nuclear Power Reactor Coolant Pumps market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Motor-Driven RCP

Turbine-Driven RCP

Segmentation by Installation Direction:

Horizontal RCP

Vertical RCP

Segmentation by Rated Flow Capacity:

Below 10,000 m?/h

10,000–20,000 m?/h

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Above 20,000 m?/h

Segmentation by Application:

Nuclear Power Generation

Nuclear Power Plant Operation and Maintenance

Research and Experiment

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

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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.

Curtiss-Wright Corporation

ANDRITZ AG

Mitsubishi Heavy Industries, Ltd.

JSC Central Design Bureau of Machine Building

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Harbin Electric Corporation

Westinghouse Nuclear

Framatome

KSB

Doosan Corporation

Celeros Flow Technology

Flowserve Corporation

Key Questions Addressed in this Report

What is the 10-year outlook for the global Nuclear Power Reactor Coolant Pumps market?

What factors are driving Nuclear Power Reactor Coolant Pumps market growth, globally and by region?

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

How do Nuclear Power Reactor Coolant Pumps market opportunities vary by end market size?

How does Nuclear Power Reactor Coolant Pumps break out by Type, by Application?

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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 Power Reactor Coolant Pumps Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Nuclear Power Reactor Coolant Pumps by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Nuclear Power Reactor Coolant Pumps by Country/Region, 2021, 2025 & 2032
2.2 Nuclear Power Reactor Coolant Pumps Segment by Type
  2.2.1 Motor-Driven RCP
  2.2.2 Turbine-Driven RCP
  2.2.3 Nuclear Power Reactor Coolant Pumps Sales by Type
    2.2.3.1 Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Type (2021-2026)
    2.2.3.2 Global Nuclear Power Reactor Coolant Pumps Revenue and Market Share by Type (2021-2026)
    2.2.3.3 Global Nuclear Power Reactor Coolant Pumps Sale Price by Type (2021-2026)
2.3 Nuclear Power Reactor Coolant Pumps Segment by Installation Direction
  2.3.1 Horizontal RCP
  2.3.2 Vertical RCP
  2.3.3 Nuclear Power Reactor Coolant Pumps Sales by Installation Direction
    2.3.3.1 Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Installation Direction (2021-2026)
    2.3.3.2 Global Nuclear Power Reactor Coolant Pumps Revenue and Market Share by Installation Direction (2021-2026)

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2.3.3.3 Global Nuclear Power Reactor Coolant Pumps Sale Price by Installation Direction (2021-2026)
2.4 Nuclear Power Reactor Coolant Pumps Segment by Rated Flow Capacity
2.4.1 Below 10,000 m?/h
2.4.2 10,000–20,000 m?/h
2.4.3 Above 20,000 m?/h
2.4.4 Nuclear Power Reactor Coolant Pumps Sales by Rated Flow Capacity
2.4.4.1 Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Rated Flow Capacity (2021-2026)
2.4.4.2 Global Nuclear Power Reactor Coolant Pumps Revenue and Market Share by Rated Flow Capacity (2021-2026)
2.4.4.3 Global Nuclear Power Reactor Coolant Pumps Sale Price by Rated Flow Capacity (2021-2026)
2.5 Nuclear Power Reactor Coolant Pumps Segment by Application
2.5.1 Nuclear Power Generation
2.5.2 Nuclear Power Plant Operation and Maintenance
2.5.3 Research and Experiment
2.5.4 Others
2.5.5 Nuclear Power Reactor Coolant Pumps Sales by Application
2.5.5.1 Global Nuclear Power Reactor Coolant Pumps Sale Market Share by Application (2021-2026)
2.5.5.2 Global Nuclear Power Reactor Coolant Pumps Revenue and Market Share by Application (2021-2026)
2.5.5.3 Global Nuclear Power Reactor Coolant Pumps Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Nuclear Power Reactor Coolant Pumps Breakdown Data by Company
3.1.1 Global Nuclear Power Reactor Coolant Pumps Annual Sales by Company (2021-2026)
3.1.2 Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Company (2021-2026)
3.2 Global Nuclear Power Reactor Coolant Pumps Annual Revenue by Company (2021-2026)
3.2.1 Global Nuclear Power Reactor Coolant Pumps Revenue by Company (2021-2026)
3.2.2 Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Company (2021-2026)

+357 96 030922
info@marketpublishers.com

3.3 Global Nuclear Power Reactor Coolant Pumps Sale Price by Company
3.4 Key Manufacturers Nuclear Power Reactor Coolant Pumps Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Nuclear Power Reactor Coolant Pumps Product Location Distribution
3.4.2 Players Nuclear Power Reactor Coolant Pumps 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 POWER REACTOR COOLANT PUMPS BY GEOGRAPHIC REGION

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

5 AMERICAS

5.1 Americas Nuclear Power Reactor Coolant Pumps Sales by Country
5.1.1 Americas Nuclear Power Reactor Coolant Pumps Sales by Country (2021-2026)
5.1.2 Americas Nuclear Power Reactor Coolant Pumps Revenue by Country (2021-2026)
5.2 Americas Nuclear Power Reactor Coolant Pumps Sales by Type (2021-2026)

+357 96 030922
info@marketpublishers.com

5.3 Americas Nuclear Power Reactor Coolant Pumps Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Nuclear Power Reactor Coolant Pumps Sales by Region
  6.1.1 APAC Nuclear Power Reactor Coolant Pumps Sales by Region (2021-2026)
  6.1.2 APAC Nuclear Power Reactor Coolant Pumps Revenue by Region (2021-2026)
6.2 APAC Nuclear Power Reactor Coolant Pumps Sales by Type (2021-2026)
6.3 APAC Nuclear Power Reactor Coolant Pumps 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 Power Reactor Coolant Pumps by Country
  7.1.1 Europe Nuclear Power Reactor Coolant Pumps Sales by Country (2021-2026)
  7.1.2 Europe Nuclear Power Reactor Coolant Pumps Revenue by Country (2021-2026)
7.2 Europe Nuclear Power Reactor Coolant Pumps Sales by Type (2021-2026)
7.3 Europe Nuclear Power Reactor Coolant Pumps 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 Power Reactor Coolant Pumps by Country
  8.1.1 Middle East & Africa Nuclear Power Reactor Coolant Pumps Sales by Country

+357 96 030922
info@marketpublishers.com

(2021-2026)
8.1.2 Middle East & Africa Nuclear Power Reactor Coolant Pumps Revenue by Country (2021-2026)
8.2 Middle East & Africa Nuclear Power Reactor Coolant Pumps Sales by Type (2021-2026)
8.3 Middle East & Africa Nuclear Power Reactor Coolant Pumps 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 Power Reactor Coolant Pumps
10.3 Manufacturing Process Analysis of Nuclear Power Reactor Coolant Pumps
10.4 Industry Chain Structure of Nuclear Power Reactor Coolant Pumps

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 Nuclear Power Reactor Coolant Pumps Distributors
11.3 Nuclear Power Reactor Coolant Pumps Customer

12 WORLD FORECAST REVIEW FOR NUCLEAR POWER REACTOR COOLANT PUMPS BY GEOGRAPHIC REGION

12.1 Global Nuclear Power Reactor Coolant Pumps Market Size Forecast by Region
12.1.1 Global Nuclear Power Reactor Coolant Pumps Forecast by Region (2027-2032)

+357 96 030922
info@marketpublishers.com

12.1.2 Global Nuclear Power Reactor Coolant Pumps 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 Power Reactor Coolant Pumps Forecast by Type (2027-2032)
12.7 Global Nuclear Power Reactor Coolant Pumps Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Curtiss-Wright Corporation
13.1.1 Curtiss-Wright Corporation Company Information
13.1.2 Curtiss-Wright Corporation Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
13.1.3 Curtiss-Wright Corporation Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.1.4 Curtiss-Wright Corporation Main Business Overview
13.1.5 Curtiss-Wright Corporation Latest Developments
13.2 ANDRITZ AG
13.2.1 ANDRITZ AG Company Information
13.2.2 ANDRITZ AG Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
13.2.3 ANDRITZ AG Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 ANDRITZ AG Main Business Overview
13.2.5 ANDRITZ AG Latest Developments
13.3 Mitsubishi Heavy Industries, Ltd.
13.3.1 Mitsubishi Heavy Industries, Ltd. Company Information
13.3.2 Mitsubishi Heavy Industries, Ltd. Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
13.3.3 Mitsubishi Heavy Industries, Ltd. Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Mitsubishi Heavy Industries, Ltd. Main Business Overview
13.3.5 Mitsubishi Heavy Industries, Ltd. Latest Developments
13.4 JSC Central Design Bureau of Machine Building
13.4.1 JSC Central Design Bureau of Machine Building Company Information
13.4.2 JSC Central Design Bureau of Machine Building Nuclear Power Reactor

+357 96 030922
info@marketpublishers.com

Coolant Pumps Product Portfolios and Specifications
13.4.3 JSC Central Design Bureau of Machine Building Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 JSC Central Design Bureau of Machine Building Main Business Overview
13.4.5 JSC Central Design Bureau of Machine Building Latest Developments
13.5 Harbin Electric Corporation
13.5.1 Harbin Electric Corporation Company Information
13.5.2 Harbin Electric Corporation Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
13.5.3 Harbin Electric Corporation Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Harbin Electric Corporation Main Business Overview
13.5.5 Harbin Electric Corporation Latest Developments
13.6 Westinghouse Nuclear
13.6.1 Westinghouse Nuclear Company Information
13.6.2 Westinghouse Nuclear Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
13.6.3 Westinghouse Nuclear Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Westinghouse Nuclear Main Business Overview
13.6.5 Westinghouse Nuclear Latest Developments
13.7 Framatome
13.7.1 Framatome Company Information
13.7.2 Framatome Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
13.7.3 Framatome Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Framatome Main Business Overview
13.7.5 Framatome Latest Developments
13.8 KSB
13.8.1 KSB Company Information
13.8.2 KSB Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
13.8.3 KSB Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 KSB Main Business Overview
13.8.5 KSB Latest Developments
13.9 Doosan Corporation
13.9.1 Doosan Corporation Company Information

+357 96 030922
info@marketpublishers.com

13.9.2 Doosan Corporation Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
13.9.3 Doosan Corporation Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Doosan Corporation Main Business Overview
13.9.5 Doosan Corporation Latest Developments
13.10 Celeros Flow Technology
13.10.1 Celeros Flow Technology Company Information
13.10.2 Celeros Flow Technology Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
13.10.3 Celeros Flow Technology Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Celeros Flow Technology Main Business Overview
13.10.5 Celeros Flow Technology Latest Developments
13.11 Flowserve Corporation
13.11.1 Flowserve Corporation Company Information
13.11.2 Flowserve Corporation Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
13.11.3 Flowserve Corporation Nuclear Power Reactor Coolant Pumps Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Flowserve Corporation Main Business Overview
13.11.5 Flowserve Corporation Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. Nuclear Power Reactor Coolant Pumps Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Nuclear Power Reactor Coolant Pumps Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Motor-Driven RCP
Table 4. Major Players of Turbine-Driven RCP
Table 5. Global Nuclear Power Reactor Coolant Pumps Sales by Type (2021-2026) & (Units)
Table 6. Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Type (2021-2026)
Table 7. Global Nuclear Power Reactor Coolant Pumps Revenue by Type (2021-2026) & ($ million)
Table 8. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Type (2021-2026)
Table 9. Global Nuclear Power Reactor Coolant Pumps Sale Price by Type (2021-2026) & (K US$/Unit)
Table 10. Major Players of Horizontal RCP
Table 11. Major Players of Vertical RCP
Table 12. Global Nuclear Power Reactor Coolant Pumps Sales by Installation Direction (2021-2026) & (Units)
Table 13. Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Installation Direction (2021-2026)
Table 14. Global Nuclear Power Reactor Coolant Pumps Revenue by Installation Direction (2021-2026) & ($ million)
Table 15. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Installation Direction (2021-2026)
Table 16. Global Nuclear Power Reactor Coolant Pumps Sale Price by Installation Direction (2021-2026) & (K US$/Unit)
Table 17. Major Players of Below 10,000 m?/h
Table 18. Major Players of 10,000–20,000 m?/h
Table 19. Major Players of Above 20,000 m?/h
Table 20. Global Nuclear Power Reactor Coolant Pumps Sales by Rated Flow Capacity (2021-2026) & (Units)
Table 21. Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Rated Flow Capacity (2021-2026)

+357 96 030922
info@marketpublishers.com

Table 22. Global Nuclear Power Reactor Coolant Pumps Revenue by Rated Flow Capacity (2021-2026) & ($ million)
Table 23. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Rated Flow Capacity (2021-2026)
Table 24. Global Nuclear Power Reactor Coolant Pumps Sale Price by Rated Flow Capacity (2021-2026) & (K US$/Unit)
Table 25. Global Nuclear Power Reactor Coolant Pumps Sale by Application (2021-2026) & (Units)
Table 26. Global Nuclear Power Reactor Coolant Pumps Sale Market Share by Application (2021-2026)
Table 27. Global Nuclear Power Reactor Coolant Pumps Revenue by Application (2021-2026) & ($ million)
Table 28. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Application (2021-2026)
Table 29. Global Nuclear Power Reactor Coolant Pumps Sale Price by Application (2021-2026) & (K US$/Unit)
Table 30. Global Nuclear Power Reactor Coolant Pumps Sales by Company (2021-2026) & (Units)
Table 31. Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Company (2021-2026)
Table 32. Global Nuclear Power Reactor Coolant Pumps Revenue by Company (2021-2026) & ($ millions)
Table 33. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Company (2021-2026)
Table 34. Global Nuclear Power Reactor Coolant Pumps Sale Price by Company (2021-2026) & (K US$/Unit)
Table 35. Key Manufacturers Nuclear Power Reactor Coolant Pumps Producing Area Distribution and Sales Area
Table 36. Players Nuclear Power Reactor Coolant Pumps Products Offered
Table 37. Nuclear Power Reactor Coolant Pumps Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 38. New Products and Potential Entrants
Table 39. Market M&A Activity & Strategy
Table 40. Global Nuclear Power Reactor Coolant Pumps Sales by Geographic Region (2021-2026) & (Units)
Table 41. Global Nuclear Power Reactor Coolant Pumps Sales Market Share Geographic Region (2021-2026)
Table 42. Global Nuclear Power Reactor Coolant Pumps Revenue by Geographic Region (2021-2026) & ($ millions)

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Table 43. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Geographic Region (2021-2026)
Table 44. Global Nuclear Power Reactor Coolant Pumps Sales by Country/Region (2021-2026) & (Units)
Table 45. Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Country/Region (2021-2026)
Table 46. Global Nuclear Power Reactor Coolant Pumps Revenue by Country/Region (2021-2026) & ($ millions)
Table 47. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Country/Region (2021-2026)
Table 48. Americas Nuclear Power Reactor Coolant Pumps Sales by Country (2021-2026) & (Units)
Table 49. Americas Nuclear Power Reactor Coolant Pumps Sales Market Share by Country (2021-2026)
Table 50. Americas Nuclear Power Reactor Coolant Pumps Revenue by Country (2021-2026) & ($ millions)
Table 51. Americas Nuclear Power Reactor Coolant Pumps Sales by Type (2021-2026) & (Units)
Table 52. Americas Nuclear Power Reactor Coolant Pumps Sales by Application (2021-2026) & (Units)
Table 53. APAC Nuclear Power Reactor Coolant Pumps Sales by Region (2021-2026) & (Units)
Table 54. APAC Nuclear Power Reactor Coolant Pumps Sales Market Share by Region (2021-2026)
Table 55. APAC Nuclear Power Reactor Coolant Pumps Revenue by Region (2021-2026) & ($ millions)
Table 56. APAC Nuclear Power Reactor Coolant Pumps Sales by Type (2021-2026) & (Units)
Table 57. APAC Nuclear Power Reactor Coolant Pumps Sales by Application (2021-2026) & (Units)
Table 58. Europe Nuclear Power Reactor Coolant Pumps Sales by Country (2021-2026) & (Units)
Table 59. Europe Nuclear Power Reactor Coolant Pumps Revenue by Country (2021-2026) & ($ millions)
Table 60. Europe Nuclear Power Reactor Coolant Pumps Sales by Type (2021-2026) & (Units)
Table 61. Europe Nuclear Power Reactor Coolant Pumps Sales by Application (2021-2026) & (Units)
Table 62. Middle East & Africa Nuclear Power Reactor Coolant Pumps Sales by

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Country (2021-2026) & (Units)
Table 63. Middle East & Africa Nuclear Power Reactor Coolant Pumps Revenue Market Share by Country (2021-2026)
Table 64. Middle East & Africa Nuclear Power Reactor Coolant Pumps Sales by Type (2021-2026) & (Units)
Table 65. Middle East & Africa Nuclear Power Reactor Coolant Pumps Sales by Application (2021-2026) & (Units)
Table 66. Key Market Drivers & Growth Opportunities of Nuclear Power Reactor Coolant Pumps
Table 67. Key Market Challenges & Risks of Nuclear Power Reactor Coolant Pumps
Table 68. Key Industry Trends of Nuclear Power Reactor Coolant Pumps
Table 69. Nuclear Power Reactor Coolant Pumps Raw Material
Table 70. Key Suppliers of Raw Materials
Table 71. Nuclear Power Reactor Coolant Pumps Distributors List
Table 72. Nuclear Power Reactor Coolant Pumps Customer List
Table 73. Global Nuclear Power Reactor Coolant Pumps Sales Forecast by Region (2027-2032) & (Units)
Table 74. Global Nuclear Power Reactor Coolant Pumps Revenue Forecast by Region (2027-2032) & ($ millions)
Table 75. Americas Nuclear Power Reactor Coolant Pumps Sales Forecast by Country (2027-2032) & (Units)
Table 76. Americas Nuclear Power Reactor Coolant Pumps Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 77. APAC Nuclear Power Reactor Coolant Pumps Sales Forecast by Region (2027-2032) & (Units)
Table 78. APAC Nuclear Power Reactor Coolant Pumps Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 79. Europe Nuclear Power Reactor Coolant Pumps Sales Forecast by Country (2027-2032) & (Units)
Table 80. Europe Nuclear Power Reactor Coolant Pumps Revenue Forecast by Country (2027-2032) & ($ millions)
Table 81. Middle East & Africa Nuclear Power Reactor Coolant Pumps Sales Forecast by Country (2027-2032) & (Units)
Table 82. Middle East & Africa Nuclear Power Reactor Coolant Pumps Revenue Forecast by Country (2027-2032) & ($ millions)
Table 83. Global Nuclear Power Reactor Coolant Pumps Sales Forecast by Type (2027-2032) & (Units)
Table 84. Global Nuclear Power Reactor Coolant Pumps Revenue Forecast by Type (2027-2032) & ($ millions)

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Table 85. Global Nuclear Power Reactor Coolant Pumps Sales Forecast by Application (2027-2032) & (Units)
Table 86. Global Nuclear Power Reactor Coolant Pumps Revenue Forecast by Application (2027-2032) & ($ millions)
Table 87. Curtiss-Wright Corporation Basic Information, Nuclear Power Reactor Coolant Pumps Manufacturing Base, Sales Area and Its Competitors
Table 88. Curtiss-Wright Corporation Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 89. Curtiss-Wright Corporation Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 90. Curtiss-Wright Corporation Main Business
Table 91. Curtiss-Wright Corporation Latest Developments
Table 92. ANDRITZ AG Basic Information, Nuclear Power Reactor Coolant Pumps Manufacturing Base, Sales Area and Its Competitors
Table 93. ANDRITZ AG Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 94. ANDRITZ AG Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 95. ANDRITZ AG Main Business
Table 96. ANDRITZ AG Latest Developments
Table 97. Mitsubishi Heavy Industries, Ltd. Basic Information, Nuclear Power Reactor Coolant Pumps Manufacturing Base, Sales Area and Its Competitors
Table 98. Mitsubishi Heavy Industries, Ltd. Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 99. Mitsubishi Heavy Industries, Ltd. Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 100. Mitsubishi Heavy Industries, Ltd. Main Business
Table 101. Mitsubishi Heavy Industries, Ltd. Latest Developments
Table 102. JSC Central Design Bureau of Machine Building Basic Information, Nuclear Power Reactor Coolant Pumps Manufacturing Base, Sales Area and Its Competitors
Table 103. JSC Central Design Bureau of Machine Building Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 104. JSC Central Design Bureau of Machine Building Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 105. JSC Central Design Bureau of Machine Building Main Business
Table 106. JSC Central Design Bureau of Machine Building Latest Developments
Table 107. Harbin Electric Corporation Basic Information, Nuclear Power Reactor Coolant Pumps Manufacturing Base, Sales Area and Its Competitors

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Table 108. Harbin Electric Corporation Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 109. Harbin Electric Corporation Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 110. Harbin Electric Corporation Main Business
Table 111. Harbin Electric Corporation Latest Developments
Table 112. Westinghouse Nuclear Basic Information, Nuclear Power Reactor Coolant Pumps Manufacturing Base, Sales Area and Its Competitors
Table 113. Westinghouse Nuclear Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 114. Westinghouse Nuclear Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 115. Westinghouse Nuclear Main Business
Table 116. Westinghouse Nuclear Latest Developments
Table 117. Framatome Basic Information, Nuclear Power Reactor Coolant Pumps Manufacturing Base, Sales Area and Its Competitors
Table 118. Framatome Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 119. Framatome Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 120. Framatome Main Business
Table 121. Framatome Latest Developments
Table 122. KSB Basic Information, Nuclear Power Reactor Coolant Pumps Manufacturing Base, Sales Area and Its Competitors
Table 123. KSB Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 124. KSB Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 125. KSB Main Business
Table 126. KSB Latest Developments
Table 127. Doosan Corporation Basic Information, Nuclear Power Reactor Coolant Pumps Manufacturing Base, Sales Area and Its Competitors
Table 128. Doosan Corporation Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 129. Doosan Corporation Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 130. Doosan Corporation Main Business
Table 131. Doosan Corporation Latest Developments
Table 132. Celeros Flow Technology Basic Information, Nuclear Power Reactor Coolant

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Pumps Manufacturing Base, Sales Area and Its Competitors
Table 133. Celeros Flow Technology Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 134. Celeros Flow Technology Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 135. Celeros Flow Technology Main Business
Table 136. Celeros Flow Technology Latest Developments
Table 137. Flowserve Corporation Basic Information, Nuclear Power Reactor Coolant Pumps Manufacturing Base, Sales Area and Its Competitors
Table 138. Flowserve Corporation Nuclear Power Reactor Coolant Pumps Product Portfolios and Specifications
Table 139. Flowserve Corporation Nuclear Power Reactor Coolant Pumps Sales (Units), Revenue ($ Million), Price (K US$/Unit) and Gross Margin (2021-2026)
Table 140. Flowserve Corporation Main Business
Table 141. Flowserve Corporation Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Nuclear Power Reactor Coolant Pumps
Figure 2. Nuclear Power Reactor Coolant Pumps Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Nuclear Power Reactor Coolant Pumps Sales Growth Rate 2021-2032 (Units)
Figure 7. Global Nuclear Power Reactor Coolant Pumps Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Nuclear Power Reactor Coolant Pumps Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Nuclear Power Reactor Coolant Pumps Sales Market Share by Country/Region (2025)
Figure 10. Nuclear Power Reactor Coolant Pumps Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Motor-Driven RCP
Figure 12. Product Picture of Turbine-Driven RCP
Figure 13. Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Type in 2026
Figure 14. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Type (2021-2026)
Figure 15. Product Picture of Horizontal RCP
Figure 16. Product Picture of Vertical RCP
Figure 17. Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Installation Direction in 2026
Figure 18. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Installation Direction (2021-2026)
Figure 19. Product Picture of Below 10,000 m?/h
Figure 20. Product Picture of 10,000–20,000 m?/h
Figure 21. Product Picture of Above 20,000 m?/h
Figure 22. Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Rated Flow Capacity in 2026
Figure 23. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Rated Flow Capacity (2021-2026)
Figure 24. Nuclear Power Reactor Coolant Pumps Consumed in Nuclear Power

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Generation
Figure 25. Global Nuclear Power Reactor Coolant Pumps Market: Nuclear Power Generation (2021-2026) & (Units)
Figure 26. Nuclear Power Reactor Coolant Pumps Consumed in Nuclear Power Plant Operation and Maintenance
Figure 27. Global Nuclear Power Reactor Coolant Pumps Market: Nuclear Power Plant Operation and Maintenance (2021-2026) & (Units)
Figure 28. Nuclear Power Reactor Coolant Pumps Consumed in Research and Experiment
Figure 29. Global Nuclear Power Reactor Coolant Pumps Market: Research and Experiment (2021-2026) & (Units)
Figure 30. Nuclear Power Reactor Coolant Pumps Consumed in Others
Figure 31. Global Nuclear Power Reactor Coolant Pumps Market: Others (2021-2026) & (Units)
Figure 32. Global Nuclear Power Reactor Coolant Pumps Sale Market Share by Application (2025)
Figure 33. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Application in 2025
Figure 34. Nuclear Power Reactor Coolant Pumps Sales by Company in 2025 (Units)
Figure 35. Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Company in 2025
Figure 36. Nuclear Power Reactor Coolant Pumps Revenue by Company in 2025 ($ millions)
Figure 37. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Company in 2025
Figure 38. Global Nuclear Power Reactor Coolant Pumps Sales Market Share by Geographic Region (2021-2026)
Figure 39. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share by Geographic Region in 2025
Figure 40. Americas Nuclear Power Reactor Coolant Pumps Sales 2021-2026 (Units)
Figure 41. Americas Nuclear Power Reactor Coolant Pumps Revenue 2021-2026 ($ millions)
Figure 42. APAC Nuclear Power Reactor Coolant Pumps Sales 2021-2026 (Units)
Figure 43. APAC Nuclear Power Reactor Coolant Pumps Revenue 2021-2026 ($ millions)
Figure 44. Europe Nuclear Power Reactor Coolant Pumps Sales 2021-2026 (Units)
Figure 45. Europe Nuclear Power Reactor Coolant Pumps Revenue 2021-2026 ($ millions)
Figure 46. Middle East & Africa Nuclear Power Reactor Coolant Pumps Sales

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2021-2026 (Units)
Figure 47. Middle East & Africa Nuclear Power Reactor Coolant Pumps Revenue 2021-2026 ($ millions)
Figure 48. Americas Nuclear Power Reactor Coolant Pumps Sales Market Share by Country in 2025
Figure 49. Americas Nuclear Power Reactor Coolant Pumps Revenue Market Share by Country (2021-2026)
Figure 50. Americas Nuclear Power Reactor Coolant Pumps Sales Market Share by Type (2021-2026)
Figure 51. Americas Nuclear Power Reactor Coolant Pumps Sales Market Share by Application (2021-2026)
Figure 52. United States Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 53. Canada Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 54. Mexico Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 55. Brazil Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 56. APAC Nuclear Power Reactor Coolant Pumps Sales Market Share by Region in 2025
Figure 57. APAC Nuclear Power Reactor Coolant Pumps Revenue Market Share by Region (2021-2026)
Figure 58. APAC Nuclear Power Reactor Coolant Pumps Sales Market Share by Type (2021-2026)
Figure 59. APAC Nuclear Power Reactor Coolant Pumps Sales Market Share by Application (2021-2026)
Figure 60. China Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 61. Japan Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 62. South Korea Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 63. Southeast Asia Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 64. India Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 65. Australia Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)

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Figure 66. China Taiwan Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 67. Europe Nuclear Power Reactor Coolant Pumps Sales Market Share by Country in 2025
Figure 68. Europe Nuclear Power Reactor Coolant Pumps Revenue Market Share by Country (2021-2026)
Figure 69. Europe Nuclear Power Reactor Coolant Pumps Sales Market Share by Type (2021-2026)
Figure 70. Europe Nuclear Power Reactor Coolant Pumps Sales Market Share by Application (2021-2026)
Figure 71. Germany Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 72. France Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 73. UK Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 74. Italy Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 75. Russia Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 76. Middle East & Africa Nuclear Power Reactor Coolant Pumps Sales Market Share by Country (2021-2026)
Figure 77. Middle East & Africa Nuclear Power Reactor Coolant Pumps Sales Market Share by Type (2021-2026)
Figure 78. Middle East & Africa Nuclear Power Reactor Coolant Pumps Sales Market Share by Application (2021-2026)
Figure 79. Egypt Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 80. South Africa Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 81. Israel Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 82. Turkey Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 83. GCC Countries Nuclear Power Reactor Coolant Pumps Revenue Growth 2021-2026 ($ millions)
Figure 84. Manufacturing Cost Structure Analysis of Nuclear Power Reactor Coolant Pumps in 2026
Figure 85. Manufacturing Process Analysis of Nuclear Power Reactor Coolant Pumps

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Figure 86. Industry Chain Structure of Nuclear Power Reactor Coolant Pumps
Figure 87. Channels of Distribution
Figure 88. Global Nuclear Power Reactor Coolant Pumps Sales Market Forecast by Region (2027-2032)
Figure 89. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share Forecast by Region (2027-2032)
Figure 90. Global Nuclear Power Reactor Coolant Pumps Sales Market Share Forecast by Type (2027-2032)
Figure 91. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share Forecast by Type (2027-2032)
Figure 92. Global Nuclear Power Reactor Coolant Pumps Sales Market Share Forecast by Application (2027-2032)
Figure 93. Global Nuclear Power Reactor Coolant Pumps Revenue Market Share Forecast by Application (2027-2032)

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