

Global Sealed Sources Market Growth 2026-2032

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Abstracts

The global Sealed Sources market size is predicted to grow from US\$ 1076 million in 2025 to US\$ 1472 million in 2032; it is expected to grow at a CAGR of 4.7% from 2026 to 2032.

A Sealed Source is defined as radioactive material that is permanently sealed in a capsule or closely bonded in a solid form. The primary design objective of a sealed source is to prevent the leakage or dispersal of radioactive substances under normal conditions of use and during foreseeable accidents, while still allowing the ionizing radiation (such as gamma, X-rays, or neutrons) to pass through the capsule for its intended application.

The encapsulation is typically made of high-strength, corrosion-resistant materials like stainless steel, titanium, or platinum. According to International Atomic Energy Agency (IAEA) standards, these sources must undergo rigorous testing—including impact, vibration, puncture, and heat resistance—to ensure Special Form certification. This containment is crucial because, unlike unsealed sources used in nuclear medicine (radiopharmaceuticals), a sealed source is intended to remain physically intact throughout its entire working life and subsequent disposal.

A Sealed Source refers to a radioactive source in which the radioactive material is permanently encapsulated within a robust container, designed to prevent the release of radioactive substances under normal operating conditions and foreseeable accidents while allowing controlled emission of radiation. Sealed sources are widely used across industrial non-destructive testing (NDT), medical radiation therapy and diagnostics, scientific research, energy, and security applications. As a foundational component of civilian nuclear technology, the sealed source market is characterized by high technical complexity, strict regulatory oversight, and significant barriers to entry, making it a specialized but strategically important segment of the global nuclear technology value

chain.

From a demand perspective, the industrial sector remains a major pillar of the sealed source market. In non-destructive testing applications, sealed sources are essential for inspecting welds, pipelines, pressure vessels, and structural components, particularly in oil and gas, petrochemical, power generation, and heavy manufacturing industries. Their ability to provide deep penetration, consistent radiation output, and reliable performance without reliance on complex electrical systems makes sealed sources especially valuable in remote or harsh operating environments. Additionally, sealed-source-based measurement instruments?such as density gauges, level gauges, and thickness gauges?are widely deployed in continuous process control across steel, cement, paper, and chemical industries, supporting automation, quality assurance, and operational safety. As infrastructure maintenance and industrial automation continue to expand globally, these applications provide a stable and recurring demand base.

In the medical sector, sealed sources represent one of the highest-value application areas. They are widely used in radiation therapy, brachytherapy, and selected diagnostic procedures. Although linear accelerators and other non-radioactive technologies have gained market share in advanced healthcare systems, sealed-source-based solutions remain highly relevant due to their cost-effectiveness, operational stability, and lower maintenance requirements. In emerging markets and resource-constrained healthcare environments, sealed sources often serve as a practical and reliable option for cancer treatment. With global aging trends, rising cancer incidence, and ongoing investments in healthcare infrastructure?particularly in developing regions?the medical sealed source segment is expected to maintain steady long-term demand.

Regulatory and supply-side factors play a defining role in shaping the sealed source market. The entire lifecycle of a sealed source?from production and transportation to use, storage, recycling, and final disposal?is governed by stringent international and national regulations, notably those established by the International Atomic Energy Agency (IAEA). While such regulatory frameworks significantly raise compliance costs and limit the number of qualified suppliers, they also reinforce the market position of established manufacturers with proven safety records and comprehensive lifecycle management capabilities. Increasingly, customers evaluate suppliers not only on product performance but also on their ability to provide regulatory support, secure logistics, source tracking, and end-of-life disposal solutions.

Looking ahead, the sealed source market is expected to evolve along three key

dimensions: technical refinement, service integration, and risk management. Manufacturers are investing in improved encapsulation technologies, enhanced durability, and longer service life to meet the demands of high-end industrial and medical users. At the same time, value creation is shifting toward integrated service offerings, including digital source tracking, compliance consulting, and source recovery programs. Although alternative non-radioactive technologies continue to challenge certain applications, sealed sources retain clear advantages in scenarios requiring deep penetration, long-term stability, and reliable performance under extreme conditions. Overall, the Sealed Source market represents a low-volatility, high-reliability segment with enduring strategic relevance in the global nuclear and industrial technology landscape.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Sealed Sources 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 Sealed Sources.

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

Segmentation by Type:

Na-22

Co-57

Sr-90

Co-60I-131

Others

Segmentation by Type of Radiation:

Cat 1

Cat 2

Cat 3

Cat 4

Cat 5

Segmentation by IAEA Safety Category:

Alpha Source

Beta Source

Segmentation by Application:

Industry

Medical

Scientific Research

Other

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.

NRG

Rosatom

NTP Radioisotopes

ANSTO

Nordion

IRE

Curium Pharma

Eckert & Ziegler Strahlen

China Isotope & Radiation Corporation (CIRC)

Polatom

Key Questions Addressed in this Report

What is the 10-year outlook for the global Sealed Sources market?

What factors are driving Sealed Sources market growth, globally and by region?

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

How do Sealed Sources market opportunities vary by end market size?

How does Sealed Sources break out by Type, by Application?

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