

Global Nuclear Heat Exchanger Market Analysis and Forecasts to 2015

GlobalData's report on "**Global Nuclear Heat Exchanger Market Analysis and Forecasts to 2015**" presents the global and regional estimation of the market size and revenue of heat exchangers used in the commercial nuclear facilities. The major heat exchanger types included in the study are heat exchangers for Steam generators, Condenser-heat exchangers and heat exchangers for moderator circuit.

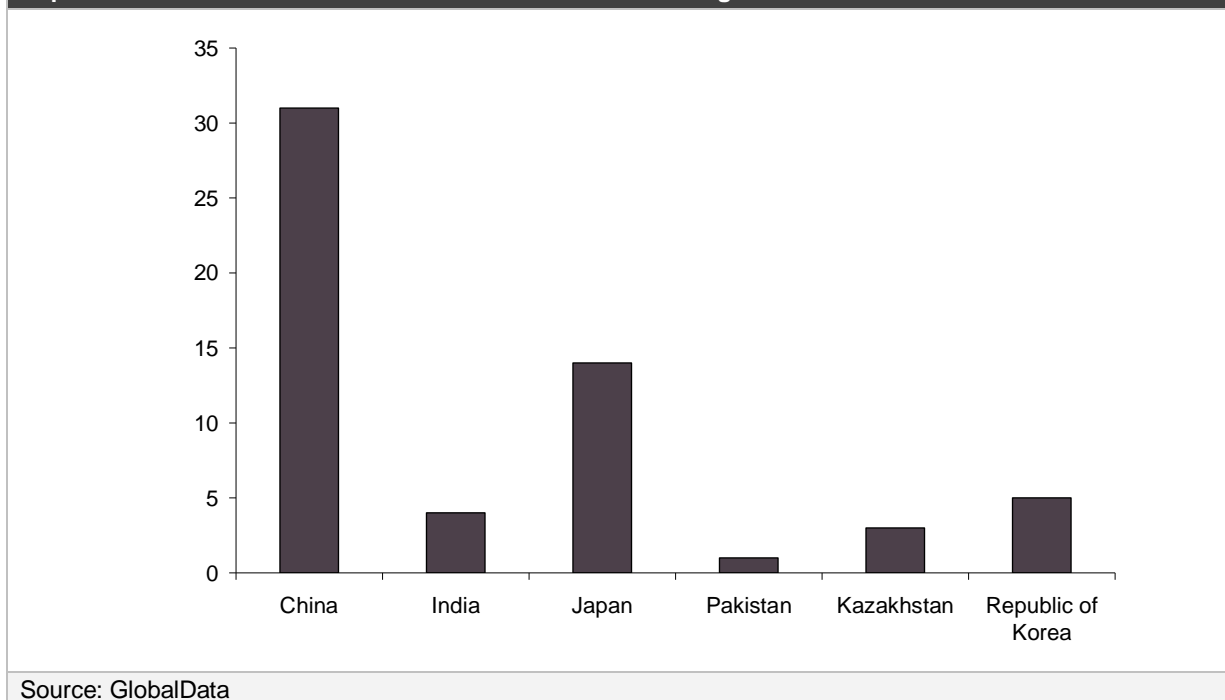
Nuclear Industry Expansion to Drive Heat Exchanger Market

There are about 46 new reactors expected to come online during the period 2006-2015, which indicates a demand growth for the heat exchanger market worldwide. There will also be significant demand for heat exchangers in the aftermarket as many of the existing reactors would require replacement of heat exchangers as they complete 20 years and 30 years of life online. Hence aftermarket will also play a key role in the heat exchanger sector growth.

Europe and Asia Pacific to Play Key Roles in Nuclear Heat Exchanger Market

Europe is a key market for the heat exchanger industry as many of the existing reactors as well as new reactors will require heat exchangers replacement. During the period under study, about 120 reactors in Europe will require steam generator-heat exchanger, followed by the Asia Pacific region and North America which have 53 nuclear reactors each. The Central and South America, and Middle East and African region have relatively smaller fleet of reactors and hence are estimated to have only three nuclear reactors each during the period under study. In the Middle East and Africa region, only one new nuclear reactor is scheduled to begin commercial operation by the end of 2009 in Iran. The year 2014 will have the highest number of reactors requiring heat exchangers by the year 2015 and 2011. The global estimate shows that in the year 2014, worldwide 33 reactors would require condenser-heat exchangers, which is the highest during the period 2006-2015. Europe and The Asia Pacific region are expected to have higher usage level in most of the years during the period under study.

Proposed and Planned Nuclear Reactors in the Asia Pacific region as of 2008



Steam Generator-Heat Exchangers Market to Show Notable Revenue Growth

Demand for steam generator-heat exchangers in the world will rise from the 2006 levels of 46 to 110 by the year 2015 at an AAGR of about 9.68%. This corresponds to a revenue growth from \$138 million in 2006 to \$512 million in 2015. Globally, the demand for the steam generator-heat exchangers is estimated to be the highest during the year 2014. During the period 2009-15 the demand for steam generator-heat exchanger is expected to grow at an AAGR of 9.21% and the revenue to grow at an AARG of 12.4%.

Unlike steam generator-heat exchangers, condenser heat exchangers and moderator heat exchangers are expected to witness a fall in revenue. The demand for condenser heat exchangers globally is expected to have a negative AAGR of 6.56% during the period 2006-15 and the demand for moderator- heat exchangers is expected to decrease from the 2006 levels of 97 units to 54 units in 2015 with a negative AAGR of 6.56%.

Key Players from Europe to Benefit from Heat Exchanger Market Growth

Europe has some of the major nuclear industry players in the world, as the region has the largest number of operating nuclear reactors in the world. The major players in this segment in Europe are Areva NP and ENSA which will be some of the potential beneficiaries of the high demand for heat exchangers from this region. These equipment manufacturers can also get potential market in Asia Pacific which does not have many global players in nuclear equipment sector.

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