

Global Uranium Enrichment Market Size Study & Forecast, by Type (Gas Centrifuge, Gas Diffusion, and Others) by Application (Nuclear Power Generation, Research, and Others) and Regional Forecasts 2025-2035

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Abstracts

The Global Uranium Enrichment Market, valued close to USD 9.3 billion in 2024, is projected to expand steadily at a CAGR of 4.86% throughout the forecast window of 2025–2035. Uranium enrichment plays an indispensable role in elevating the concentration of U-235 isotopes to levels required for nuclear reactors and various advanced research activities. As nations increasingly shift toward energy portfolios that promise both stability and decarbonization, enriched uranium has resurfaced as a strategic resource. With geopolitical shifts reshaping nuclear supply chains and governments intensifying investments in modernizing their nuclear infrastructures, the global industry continues to accelerate its technological transformation. The market's momentum is further strengthened by renewed commitments to low-carbon baseload energy, prompting utilities to ramp up long-term procurement of enriched uranium.

Growing dependence on nuclear energy as a hedge against fossil-fuel volatility has significantly amplified enrichment requirements. The resurgence of nuclear reactor construction across Asia and selective restarts in Europe have pushed utilities to secure enrichment capacity well into the next decade. According to energy transition analyses, dozens of new nuclear power units are either under construction or planned globally, while small modular reactors (SMRs) are entering pre-commercial development phases—each requiring carefully calibrated enriched uranium grades. At the same time, advancements in centrifuge cascades, automation, and digital monitoring continue to elevate production efficiency. However, slow permitting cycles, strict regulatory frameworks, and proliferation-related concerns persist as restraining factors throughout

the forecast period of 2025–2035.

The detailed segments and sub-segments included in the report are:

By Type:

Gas Centrifuge

Gas Diffusion

Others

By Application:

Nuclear Power Generation

Research

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Gas Centrifuge Technology Is Expected to Dominate the Market

Gas centrifuge technology continues to secure the lion's share of the uranium enrichment landscape, driven by its unmatched energy efficiency and operational reliability. As nuclear utilities push to optimize procurement expenditures across multi-year supply cycles, centrifuge systems have emerged as the favored choice due to their lower electricity consumption and significantly reduced environmental footprint compared to diffusion-based systems. This segment's dominance is reinforced by continuous upgrades in rotor materials, cascade design, and digitalized process controls, enabling producers to scale capacity while navigating increasingly stringent nuclear compliance requirements. While gas diffusion remains relevant in a handful of legacy facilities, centrifuge technology is expected to maintain an overwhelming lead in market share during the entire forecast period.

Nuclear Power Generation Leads in Revenue Contribution

When analyzing the market by application, nuclear power generation stands firmly as the highest revenue contributor. The segment commands the greatest demand due to the escalating need for enriched uranium as nations deploy new reactors to stabilize grid reliability and reduce carbon emissions. As energy security concerns intensify, utilities continue to lock in long-term supply contracts, strengthening revenue streams in this segment. Meanwhile, the research segment—supported by advanced reactor testing, space propulsion studies, and isotope science—shows promising growth potential. Still, it trails far behind power generation, which remains the central engine driving procurement volumes and long-term enrichment commitments.

The key regions assessed in this Global Uranium Enrichment Market study encompass North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. North America dominated the market in 2025, supported by a well-established nuclear ecosystem, refurbishment of aging reactors, and sovereign initiatives to rebuild domestic enrichment capacity. Europe maintains a substantial share due to its long history of nuclear energy deployment and ongoing shifts toward energy independence. Meanwhile, Asia Pacific is projected to witness the most accelerated growth, fueled by rapid industrialization, rising electricity demand, and a wave of nuclear construction projects, particularly in China and India. Countries across the Middle East are also exploring nuclear pathways to diversify energy sources, while Latin America continues to strengthen research-driven enrichment initiatives.

Major market players included in this report are:

Urenco Group

Rosatom

Orano Group

CNNC (China National Nuclear Corporation)

Westinghouse Electric Company

Kazatomprom

Cameco Corporation

Global Laser Enrichment (GLE)

Toshiba Energy Systems

Mitsubishi Heavy Industries

TerraPower

Framatome

GE Hitachi Nuclear Energy

Doosan Enerbility

Holtec International

Global Uranium Enrichment Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth Factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments and countries in recent years and to forecast their values for the coming decade. The report integrates qualitative and quantitative insights across all participating regions, examining critical drivers, restraints, and industry challenges that are likely to influence market evolution. It further identifies investment-ready micro-markets, along with a comprehensive review of competitive dynamics and strategic product developments initiated by key players. The detailed segmentation of the market is outlined above.

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level insights across major regions.

Competitive landscape with information on major market participants.

Analysis of key business strategies and recommendations for future market positioning.

Structural analysis of the market's competitive ecosystem.

Evaluation of demand-side and supply-side dynamics shaping the market.

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