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Global Blanket Shield Modules Market 2026 by Company, Regions, Type and Application, Forecast to 2032

https://marketpublishers.com/r/G6D8E2178700EN.html
Date: November 2026
Pages: 72
Price: US$ 3,480.00 (Single User License)
ID: G6D8E2178700EN

Abstracts

According to our (Global Info Research) latest study, the global Blanket Shield Modules market size was valued at US$ 18.73 million in 2025 and is forecast to a readjusted size of US$ 50.12 million by 2032 with a CAGR of 14.8% during review period.

The blanket shield module is one of the most critical core components located on the inner wall of the vacuum chamber in magnetic confinement fusion devices such as the International Thermonuclear Experimental Reactor (ITER). It plays a vital role in shielding against neutrons. If uncontrolled, the high-energy neutrons produced by the fusion reaction can severely damage the vacuum chamber walls and surrounding critical components such as the superconducting magnets. The shield module utilizes its material properties to effectively absorb and decelerate these high-energy neutrons, protecting the structural safety of the device.

Structurally, each cladding module mainly consists of a first wall, a shielding block, and flexible supports. The first wall directly faces the plasma and withstands extremely high heat flux; the shielding block is the main component for neutron shielding and heat dissipation. The main material for manufacturing the shielding block is 316LN stainless steel. Its manufacturing process is extremely complex, requiring a series of challenging steps such as forging large forgings, precision welding, and deep drilling (with hole diameters typically between 12-30 mm). A single module measures approximately 1 meter × 1.5 meters and can weigh up to 4.6 tons. The entire cladding system has over 180 design variations to accommodate different positions on the inner wall of the vacuum chamber.

The blanket shielding module is a key internal structural component in magnetic

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confinement fusion devices, particularly tokamak fusion reactors. Primarily installed between the inner wall of the vacuum chamber and the superconducting magnet, it withstands the high-energy neutron radiation and heat load generated by the fusion plasma, while protecting the vacuum chamber, superconducting magnet, and other critical equipment from radiation damage. Unlike the shielding structures in traditional nuclear fission reactors, the fusion blanket shielding module not only performs radiation protection but also needs to fulfill multiple functions, including neutron energy conversion, tritium breeding, heat transfer, and structural support. It is a crucial core component for the future commercialization of fusion energy.

Global energy transition and low-carbon development goals are further driving investment in nuclear fusion technology. As a vital component of fusion reactors, the technology of the blanket shielding module is rapidly evolving. Future commercial fusion devices require the blanket system to not only withstand 14 MeV high-energy neutrons for extended periods but also achieve efficient tritium breeding and heat recovery. Therefore, traditional single-layer shielding structures are evolving towards multifunctional composite blankets. As fusion reactors evolve towards higher power and longer operating times, the focus of blanket shielding modules will increasingly shift towards materials with superior radiation resistance, thermal fatigue life, structural reliability, and remote maintenance capabilities.

Currently, blanket shielding modules are still in the research, verification, and engineering preparation stages, and have not yet formed a large-scale commercial market similar to traditional nuclear power equipment, but they possess significant future growth potential. Global research efforts are currently concentrated in ITER member countries, China, the United States, Europe, Japan, and South Korea, with each country advancing the development of Test Blanket Modules (TBMs) to verify tritium breeding performance, material stability, and thermal management capabilities. With the gradual construction of DEMO demonstration reactors and commercial fusion power plants over the next few decades, blanket shielding modules will transition from experimental equipment to standardized nuclear energy equipment.

Report Scope

This report is a detailed and comprehensive analysis for global Blanket Shield Modules market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that

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contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Blanket Shield Modules market size and forecasts, in consumption value ($ Million), 2021-2032

Global Blanket Shield Modules market size and forecasts by region and country, in consumption value ($ Million), 2021-2032

Global Blanket Shield Modules market size and forecasts, by Type and by Application, in consumption value ($ Million), 2021-2032

Global Blanket Shield Modules market shares of main players, in revenue ($ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Blanket Shield Modules

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Blanket Shield Modules market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include EM Korea, Dongfang Electric (Guangzhou) Heavy Machinery, Guizhou Aerospace Xinli Technology, Hefei Metalforming Intelligent Manufacturing, Shanghai No.1 Machine Tool Works, etc.

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This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Blanket Shield Modules market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

Market segment by Type

Stainless Steel Shield Block

High-boron Steel Shield Block

Composite Shield Block

Others

Market segment by Cooling Method

Water-cooled Shield Block

Helium-cooled Shield Block

Others

Market segment by Application

Fusion Experimental Reactors

Fusion Engineering & Demonstration Reactors

Commercial Fusion Power Plants

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Others

Market segment by players, this report covers

EM Korea

Dongfang Electric (Guangzhou) Heavy Machinery

Guizhou Aerospace Xinli Technology

Hefei Metalforming Intelligent Manufacturing

Shanghai No.1 Machine Tool Works

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Blanket Shield Modules product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Blanket Shield Modules, with revenue, gross margin, and global market share of Blanket Shield Modules from 2021 to 2026.

Chapter 3, the Blanket Shield Modules competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

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Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026.and Blanket Shield Modules market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Blanket Shield Modules.

Chapter 13, to describe Blanket Shield Modules research findings and conclusion.

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