

# Global Heavy Water Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Heavy Water market size is expected to reach \$ 386 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

Deuterium oxide, also known as 'Heavy Water (D<sub>2</sub>O)' or 'deuterium water', is the compound of oxygen and the heavy isotope of hydrogen, namely deuterium. It is called Heavy Water because its density is greater than H<sub>2</sub>O and its chemical formula is D<sub>2</sub>O. Deuterium contains a neutron and proton in its nucleus, which makes it twice as heavy as protium (hydrogen), which contains only one proton. Deuterium oxide is colorless and odorless liquid in normal temperature and pressure. Compared to ordinary water, its chemical characteristic is relatively inactive with specific gravity of 1.10775 (25 °C), melting/freezing point of 3.82 °C, and boiling point of 101.42 °C. The hydrogen bond strength and degree of association between Heavy Water molecules are both stronger than that of ordinary water molecules.

In 2025, the global sales volume of heavy water exceeded 342.6 tons, with an average ex-factory price of \$680 per kilogram. Depending on the scale of the facilities, the annual production capacity of a single production line ranges from 20 to several tens of tons, and the industry's gross profit margin is approximately 50%-60%.

Regionally, established markets in North America and Europe have historically dominated heavy water production due to their early nuclear power programs and substantial infrastructure investments. However, the Asia-Pacific region has emerged as a significant player, with India leading the way through its extensive network of heavy water plants operated by the Heavy Water Board (HWB). In Latin America, Argentina continues to maintain a robust heavy water sale.

Key industry players are predominantly state-backed organizations with deep expertise in nuclear technology. For instance, India's Heavy Water Board operates seven major production plants with a combined capacity estimated at around 400 tonnes per year, supporting both domestic nuclear power generation and export markets. In Canada,

historical heavy water production facilities such as the Bruce Heavy Water Plant were once among the world's largest. Other countries, including Iran, also have significant heavy water production capacities tailored to their specific nuclear energy and defense needs. These entities collectively shape a competitive landscape that is both mature and innovation-driven.

This report studies the global Heavy Water production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Heavy Water and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Heavy Water that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Heavy Water total production and demand, 2021-2032, (Tons)

Global Heavy Water total production value, 2021-2032, (USD Million)

Global Heavy Water production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Heavy Water consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Heavy Water domestic production, consumption, key domestic manufacturers and share

Global Heavy Water production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Heavy Water production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Heavy Water production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Heavy Water market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Isowater, Cambridge Isotope Laboratories, Mesbah Energy, Heavy Water Board (HWB), Sichuan Xinhuoju Chemical, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Heavy Water market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by

year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Heavy Water Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Heavy Water Market, Segmentation by Type:

Purity 99%

Purity 99.5%-99.9%

Purity 99.9% and above

Global Heavy Water Market, Segmentation by Application:

Nuclear Power

Deuterated NMR Solvents

Semiconductor

OLED

Pharmaceutical

Others

### **Companies Profiled:**

Isowater

Cambridge Isotope Laboratories

Mesbah Energy

Heavy Water Board (HWB)

Sichuan Xinhuoju Chemical

### **Key Questions Answered:**

1. How big is the global Heavy Water market?
2. What is the demand of the global Heavy Water market?
3. What is the year over year growth of the global Heavy Water market?
4. What is the production and production value of the global Heavy Water market?
5. Who are the key producers in the global Heavy Water market?
6. What are the growth factors driving the market demand?

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