

Global Nuclear Fuel Handling Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Nuclear Fuel Handling Equipment market size was valued at US\$ 1217 million in 2025 and is forecast to a readjusted size of US\$ 1856 million by 2032 with a CAGR of 6.2% during review period.

Nuclear fuel handling equipment refers to specialized machinery and automated systems used throughout the entire process of nuclear fuel manufacturing, transportation, loading, unloading, storage, transfer, reprocessing, and waste management. Its main function is to achieve the safe handling and precise manipulation of nuclear fuel assemblies and related radioactive materials while ensuring nuclear safety, radiation protection, and criticality safety. This type of equipment typically includes fuel loading/unloading machines, fuel transfer systems, spent fuel handling machines, fuel grippers, fuel storage racks, shielded containers, remotely controlled manipulators, automated guided vehicles (AGVs), underwater fuel handling equipment, and supporting monitoring and control systems. The equipment design must meet requirements for high reliability, radiation resistance, corrosion resistance, redundancy safety, and long-term continuous operation, and comply with stringent nuclear safety regulations and quality standards. It is mainly used in nuclear power plants, research reactors, nuclear fuel manufacturing plants, spent fuel storage facilities, nuclear fuel reprocessing plants, and nuclear waste management facilities. With the development of nuclear power, the decommissioning of nuclear facilities, and the increasing demand for reprocessing, nuclear fuel handling equipment is continuously upgrading towards automation, intelligence, remote operation, and digital monitoring to further improve operational efficiency and personnel safety.

In 2025, global Nuclear Fuel Handling Equipment shipments reached approximately

1,056 units, and the average price was US\$ 1.12 million per unit. The global nuclear fuel handling equipment market continues to expand along with the development of the nuclear power industry chain. Demand primarily comes from new nuclear power plants, life extension retrofits of existing units, spent fuel storage and transfer, nuclear fuel reprocessing, and nuclear facility decommissioning. Regionally, North America and Europe maintain a leading position in high-end nuclear fuel handling equipment due to their mature nuclear power infrastructure, large nuclear decommissioning market, and well-developed nuclear fuel cycle systems. The Asia-Pacific region, driven by increased nuclear power capacity, energy structure adjustments, and improved domestic nuclear industry capabilities, has become the fastest-growing market globally. The Middle East and some emerging nuclear power countries are also gradually generating new demand as nuclear energy projects are launched. Currently, the industry is moving towards automation, intelligence, and remote operation. Robotics, digital control systems, intelligent monitoring, digital twins, and AI-assisted operations are increasingly being applied to fuel handling and storage management to improve operational efficiency and reduce personnel radiation exposure risks. However, the industry still faces challenges such as stringent nuclear safety regulations, long product certification cycles, large project investment scales, high levels of customization, and high technical barriers for key radiation-resistant materials and core components. Fluctuations in the international supply chain and a shortage of professional technical personnel also constrain the industry's development. Looking ahead, with the global extension of nuclear power life, the construction of small modular reactors (SMRs), the increased demand for spent fuel management, and the accelerated progress of nuclear decommissioning projects, the nuclear fuel processing equipment market is expected to maintain stable growth. The industry's overall average gross profit margin is typically maintained between 25% and 40%, with high-end integrated systems and customized equipment exhibiting relatively stronger profitability.

This report is a detailed and comprehensive analysis for global Nuclear Fuel Handling Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, 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 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 Nuclear Fuel Handling Equipment market size and forecasts, in consumption

value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Nuclear Fuel Handling Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Nuclear Fuel Handling Equipment market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Nuclear Fuel Handling Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 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 Nuclear Fuel Handling Equipment

- 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 Nuclear Fuel Handling Equipment market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Westinghouse Electric Company, Konecranes, Larsen & Toubro Limited, Framatome, SKF, PAR Systems, Fuji Electric, Kanadevia Corporation, BWXT, REEL International, etc.

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

Market Segmentation

Nuclear Fuel Handling Equipment 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 in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Fuel Handling Machine

Fuel Grapples and Lifting Tools

Remote Handling Manipulators

Others

Market segment by Load Capacity

Small Load Capacity Equipment (?1 Ton)

Medium Load Capacity Equipment (1?5 Tons)

Large Load Capacity Equipment (5?15 Tons)

Extra-Large Load Capacity Equipment (>15 Tons)

Market segment by Application

Nuclear Power Plant Fuel Processing

Nuclear Fuel Manufacturing Facilities

Spent Fuel Storage and Transfer

Nuclear Facility Decommissioning

Others

Major players covered

Westinghouse Electric Company

Konecranes

Larsen & Toubro Limited

Framatome

SKF

PAR Systems

Fuji Electric

Kanadevia Corporation

BWXT

REEL International

Penny Engineering

SKB

CNNC

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Nuclear Fuel Handling Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Nuclear Fuel Handling Equipment, with price, sales quantity, revenue, and global market share of Nuclear Fuel Handling Equipment from 2021 to 2026.

Chapter 3, the Nuclear Fuel Handling Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Nuclear Fuel Handling Equipment breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Nuclear Fuel Handling Equipment market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Nuclear Fuel Handling Equipment.

Chapter 14 and 15, to describe Nuclear Fuel Handling Equipment sales channel, distributors, customers, research findings and conclusion.

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