

Global Nuclear Fuel Handling Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Nuclear Fuel Handling Equipment market size is expected to reach \$ 1856 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

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 studies the global Nuclear Fuel Handling Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Nuclear Fuel Handling Equipment 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 Nuclear Fuel Handling Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Nuclear Fuel Handling Equipment total production and demand, 2021-2032, (Units)

Global Nuclear Fuel Handling Equipment total production value, 2021-2032, (USD Million)

Global Nuclear Fuel Handling Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Nuclear Fuel Handling Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Nuclear Fuel Handling Equipment domestic production, consumption, key domestic manufacturers and share

Global Nuclear Fuel Handling Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Nuclear Fuel Handling Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Nuclear Fuel Handling Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Nuclear Fuel Handling Equipment 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Nuclear Fuel Handling Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) 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 Nuclear Fuel Handling Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Nuclear Fuel Handling Equipment Market, Segmentation by Type:

Fuel Handling Machine

Fuel Grapples and Lifting Tools

Remote Handling Manipulators

Others

Global Nuclear Fuel Handling Equipment Market, Segmentation 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)

Global Nuclear Fuel Handling Equipment Market, Segmentation by Application:

Nuclear Power Plant Fuel Processing

Nuclear Fuel Manufacturing Facilities

Spent Fuel Storage and Transfer

Nuclear Facility Decommissioning

Others

Companies Profiled:

Westinghouse Electric Company

Konecranes

Larsen & Toubro Limited

Framatome

SKF

PAR Systems

Fuji Electric

Kanadevia Corporation

BWXT

REEL International

Penny Engineering

SKB

CNNC

Key Questions Answered:

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

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