

Global Nuclear Power MRO Service Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Nuclear Power MRO Service market size is expected to reach \$ 2670 million by 2032, rising at a market growth of 5.6% CAGR during the forecast period (2026-2032).

Nuclear Power MRO (Maintenance, Repair, and Overhaul) services refer to the specialized activities—such as routine maintenance, breakdown repairs, periodic inspections, major equipment overhauls, and technical upgrades—carried out on the nuclear island, conventional island, and auxiliary systems after a nuclear power plant enters the operational phase. These activities are essential for ensuring nuclear safety, equipment reliability, unit availability, and the preservation of design life. Compared to general industrial MRO, nuclear power MRO is characterized by high safety classifications, strict regulatory oversight, lengthy technical certification processes, rigorous quality traceability requirements, and limited outage windows; all operations must typically comply with nuclear safety regulations, quality assurance systems, and radiation protection standards.

In terms of scope, nuclear power MRO encompasses preventive maintenance, predictive maintenance, corrective maintenance, in-service inspection, non-destructive testing (NDT), condition monitoring, calibration and testing, spare parts replacement, and equipment refurbishment. "Major overhauls" are typically executed during scheduled shutdowns and refueling cycles, involving tasks such as reactor servicing, steam generator inspection, main coolant pump maintenance, turbine-generator unit servicing, valve and piping inspection, electrical system testing, and instrumentation and control (I&C) system calibration. Some projects also include digital I&C upgrades, replacement of aging equipment, power uprates, and life-extension modifications. Regarding the assets serviced, nuclear power MRO covers nuclear island equipment,

conventional island equipment, and plant auxiliary facilities. The nuclear island primarily includes the reactor pressure vessel, control rod drive mechanisms, main coolant pumps, steam generators, and safety-class valves; the conventional island includes turbines, generators, condensers, and feedwater systems; and auxiliary systems include electrical and I&C, HVAC, fire protection, water treatment, lifting equipment, radiation monitoring, and plant structures. Different equipment items carry varying nuclear safety classifications, resulting in significant differences in requirements regarding personnel qualifications, process validation, and supply chain traceability for service providers.

The expansion of global installed nuclear capacity, combined with the imperatives of energy security and the low-carbon transition, serves as the fundamental driver for the sustained growth of the nuclear power MRO (maintenance, repair, and operations) market. The aging of the global nuclear fleet and the extension of operating licenses constitute another core factor propelling industry growth. As of June 2025, the average age of operating nuclear units worldwide is approximately 32 years; over 67% of these units have been in operation for more than 30 years, and about 38% for over 40 years. To extend unit lifespans from the original design life of 40 years to 60 or even 80 years, operators must intensify efforts in equipment aging management, periodic safety reviews, non-destructive testing, material performance assessment, and the replacement of major components. This drives demand for maintenance and life-extension upgrades across areas such as steam generators, primary pumps, turbines, valves, cabling, and instrumentation and control (I&C) systems.

Technologically, nuclear MRO is shifting from periodic and corrective maintenance toward condition-based, predictive, and risk-informed maintenance. Technologies such as online sensors, equipment health management platforms, artificial intelligence, digital twins, robotic inspections, and remote testing are increasingly being deployed for anomaly detection, residual life prediction, and maintenance schedule optimization, thereby reducing outage times and personnel radiation exposure. However, the upgrade of digital I&C systems involves addressing challenges related to nuclear-grade equipment qualification, cybersecurity, data reliability, and regulatory approvals; consequently, new technologies are typically introduced into nuclear power plants through a gradual, incremental approach.

Looking ahead, nuclear MRO services will increasingly be characterized by full-lifecycle management, specialization, and localization. Operators will favor long-term service agreements that bundle the procurement of spare parts, condition monitoring, scheduled overhauls, technical upgrades, and lifespan management, while collaboration

among original equipment manufacturers (OEMs), nuclear engineering groups, and regional specialized service providers will deepen. Simultaneously, supply chain security requirements will drive the localization or regionalization of nuclear-grade spare parts supplies. With the gradual commercial deployment of small modular reactors (SMRs) and advanced reactor designs, the industry will see emerging demand for modular maintenance, remote O&M, and higher levels of automation; nevertheless, aging management and life-extension upgrades for traditional large-scale reactors will remain the primary source of market growth in the medium term.

Report Scope

This report studies the global Nuclear Power MRO Service demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Nuclear Power MRO Service, 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 Power MRO Service that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Nuclear Power MRO Service total market, 2021-2032, (USD Million)

Global Nuclear Power MRO Service total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Nuclear Power MRO Service total market, key domestic companies, and share, (USD Million)

Global Nuclear Power MRO Service revenue by player, revenue and market share 2021-2026, (USD Million)

Global Nuclear Power MRO Service total market by Type, CAGR, 2021-2032, (USD Million)

Global Nuclear Power MRO Service total market by Application, CAGR,

2021-2032, (USD Million)

This report profiles major players in the global Nuclear Power MRO Service 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 Integrated Power Services, Orano, ARCYS, Valcor Engineering Corporation, Patria Group, The Merrick Group, AFRY, R.E. Mason, ATOX, GE Vernova, 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 Power MRO Service market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Power MRO Service Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Nuclear Power MRO Service Market, Segmentation by Type:

Maintenance

Repair

Operations

Global Nuclear Power MRO Service Market, Segmentation by Equipment System:

Nuclear Island System MRO

Conventional Island System MRO

Nuclear Auxiliary System MRO

Electrical and I&C MRO

Global Nuclear Power MRO Service Market, Segmentation by Contract Models:

One-off Project Maintenance Service

Annual Maintenance Contract

Long-term Service Agreement

Vessel Full-lifecycle Management Service

Global Nuclear Power MRO Service Market, Segmentation by Service Coverage:

Equipment and Component-Level MRO

System and Island-Level MRO

Integrated MRO for Single Units

Global Nuclear Power MRO Service Market, Segmentation by Application:

Pressurized Water Reactor

Boiling Water Reactor

Others

Companies Profiled:

Integrated Power Services

Orano

ARCYS

Valcor Engineering Corporation

Patria Group

The Merrick Group

AFRY

R.E. Mason

ATOX

GE Vernova

Onet Technologies

Framatome

Amentum

Equans

WSI

Mirion

General Atomics Electromagnetic Systems

Power Services Group

MISTRAS Group

Laurentis Energy Partners

Enercon

Westinghouse Nuclear

NuScale Power

MLEA

Intertek

Mammoet

MPR Associates

EnergySolutions

SOCOTEC

Sargent & Lundy

Key Questions Answered

1. How big is the global Nuclear Power MRO Service market?
2. What is the demand of the global Nuclear Power MRO Service market?
3. What is the year over year growth of the global Nuclear Power MRO Service market?
4. What is the total value of the global Nuclear Power MRO Service market?
5. Who are the Major Players in the global Nuclear Power MRO Service market?
6. What are the growth factors driving the market demand?

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