

Global Refueling Outage Services Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Refueling Outage Services market size was valued at US\$ 3529 million in 2025 and is forecast to a readjusted size of US\$ 5306 million by 2032 with a CAGR of 6.0% during review period.

Refueling Outage Services refer to a comprehensive suite of technical and engineering services provided during a nuclear power plant's scheduled shutdown to facilitate nuclear fuel replacement, equipment maintenance, system upgrades, and safety inspections. These services typically encompass reactor shutdown and startup support, spent fuel unloading and fresh fuel loading, reactor pressure vessel opening and closing, equipment maintenance and replacement, non-destructive testing (NDT), in-service inspection (ISI), valve and pump repair, instrumentation and control (I&C) system upgrades, radiation protection, waste management, and project management. Refueling outages are critical for ensuring the safe, reliable, and efficient operation of nuclear power units; they generally occur every 12 to 24 months, with shutdown periods lasting several weeks. Given the involvement of safety-critical systems and numerous concurrent operations, these services demand exceptional engineering organization, high standards of radiation protection, skilled technical personnel, and extensive project execution experience. Driven by the aging of the global nuclear fleet, the adoption of digital technologies, and the need for plant life extensions, the sector is evolving toward smart maintenance, robotic assistance, digital twin management, and shortened outage durations to enhance unit availability and reduce operations and maintenance (O&M) costs.

The refueling outage service market is a vital segment of the nuclear power operations and maintenance (O&M) sector, closely linked to the global fleet of operating nuclear

units, plant life extension programs, and the scale of new nuclear construction. North America and Europe, home to a vast number of aging nuclear units, currently constitute the largest market for refueling outage services, with demand driven primarily by periodic refueling, equipment upgrades and retrofits, and life extension projects. Meanwhile, the Asia-Pacific region has emerged as the fastest-growing market, propelled by the continuous commissioning of new nuclear units. The market is currently dominated by services such as scheduled refueling outages, in-service inspections, equipment replacement, and digital upgrades. Looking ahead, driven by the global nuclear renaissance, the development of advanced reactors and small modular reactors (SMRs), and the need for long-term operation of existing units, the industry is accelerating its shift toward intelligent maintenance, remote robotic operations, digital twin management, and predictive maintenance—all aimed at shortening outage durations and enhancing unit availability. However, the industry faces ongoing challenges, including a shortage of skilled technical personnel, increasingly stringent nuclear safety regulations, heightened radiation protection requirements, compressed outage windows, and growing project execution complexity. Furthermore, shifts in nuclear policy and requirements for supply chain localization will also influence market development. Overall, refueling outage services represent a high-tech, high-value-added segment of the nuclear service industry; average gross margins typically range from 20% to 35%, with complex upgrade projects and digital maintenance services offering relatively higher profitability.

This report is a detailed and comprehensive analysis for global Refueling Outage Services 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 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 Refueling Outage Services market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Refueling Outage Services market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Refueling Outage Services market size and forecasts, by Type and by

Application, in consumption value (\$ Million), 2021-2032

Global Refueling Outage Services 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 Refueling Outage Services

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 Refueling Outage Services 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 Westinghouse Electric Company, Framatome, GE Vernova Hitachi Nuclear Energy, BWX Technologies, Inc., Curtiss-Wright Corporation, Mitsubishi Heavy Industries, Ltd., Toshiba Energy Systems & Solutions Corporation, Hitachi-GE Nuclear Energy, Ltd., Doosan Enerbility, Kinectrics Inc., etc.

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

Market segmentation

Refueling Outage Services 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 segment by Type

Fuel Replacement Services

Inspection and Testing Services

Equipment Maintenance Services

Upgrade and Modernization Services

Others

Market segment by Cycle

Short Cycle: ≤20 Days

Medium Cycle: 21-60 Days

Long Cycle: >60 Days

Market segment by Application

PWR

BWR

SMR

Others

Market segment by players, this report covers

Westinghouse Electric Company

Framatome

GE Vernova Hitachi Nuclear Energy

BWX Technologies, Inc.

Curtiss-Wright Corporation

Mitsubishi Heavy Industries, Ltd.

Toshiba Energy Systems & Solutions Corporation

Hitachi-GE Nuclear Energy, Ltd.

Doosan Enerbility

Kinectrics Inc.

EnergySolutions, LLC

NexGen Energy Ltd.

Lotus Resources Limited

Forsys Metals Corp

CNNC

CGN

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)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Refueling Outage Services product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Refueling Outage Services, with revenue, gross margin, and global market share of Refueling Outage Services from 2021 to 2026.

Chapter 3, the Refueling Outage Services competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

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 Refueling Outage Services 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 Refueling Outage Services.

Chapter 13, to describe Refueling Outage Services research findings and conclusion.

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