

Global Refueling Outage Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Refueling Outage Services market size is expected to reach \$ 5306 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

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 studies the global Refueling Outage Services demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Refueling Outage Services, 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 Refueling Outage Services that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Refueling Outage Services total market, 2021-2032, (USD Million)

Global Refueling Outage Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Refueling Outage Services total market, key domestic companies, and share, (USD Million)

Global Refueling Outage Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global Refueling Outage Services total market by Type, CAGR, 2021-2032, (USD

Million)

Global Refueling Outage Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Refueling Outage Services 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 Refueling Outage Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Refueling Outage Services Market, Segmentation by Type:

Fuel Replacement Services

Inspection and Testing Services

Equipment Maintenance Services

Upgrade and Modernization Services

Others

Global Refueling Outage Services Market, Segmentation by Cycle:

Short Cycle: ≤20 Days

Medium Cycle: 21-60 Days

Long Cycle: >60 Days

Global Refueling Outage Services Market, Segmentation by Application:

PWR

BWR

SMR

Others

Companies Profiled:

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

Key Questions Answered

1. How big is the global Refueling Outage Services market?
2. What is the demand of the global Refueling Outage Services market?
3. What is the year over year growth of the global Refueling Outage Services market?
4. What is the total value of the global Refueling Outage Services market?
5. Who are the Major Players in the global Refueling Outage Services market?

6. What are the growth factors driving the market demand?

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