

# Global TRISO Fuel 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 TRISO Fuel market size was valued at US\$ 251 million in 2025 and is forecast to a readjusted size of US\$ 470 million by 2032 with a CAGR of 9.5% during review period.

In 2024, global TRISO Fuel production reached approximately 17,162 kg with an average global market price of around US\$ 13,264 per kg. In 2024, the global 's total production capacity of TRISO Fuel reached 19,500 kg. The industry average gross profit margin of this product reached 37%.

TRISO is short for Tri-structure Isotropic Particle Fuel. Each TRISO particle consists of a core of uranium, carbon, and oxygen fuel. The core is encased in three layers of carbon-based and ceramic-based materials to prevent the release of radioactive fission products. These particles are extremely small (about the size of a poppy seed) and very robust.

The upstream sector of the TRISO fuel supply chain involves the supply of high-purity, specialized raw materials. This includes nuclear fuel materials (such as High-Assay Low-Enriched Uranium/HALEU), specialized gas precursors for the coating layers (e.g., Methyltrichlorosilane for the silicon carbide layer), and high-purity graphite. Furthermore, precision equipment required for manufacturing, such as Chemical Vapor Deposition systems, is also a critical part of the upstream sector. The midstream sector is the core of the industry chain, responsible for transforming upstream raw materials into the final fuel product. Its core process is the fabrication of TRISO particles, which involves sequentially depositing multiple coating layers onto uranium fuel kernels via complex Chemical Vapor Deposition processes. Subsequently, tens of thousands of these TRISO particles are mixed with a graphite matrix and pressed into specific final

forms, primarily spherical fuel elements for pebble-bed reactors or prismatic fuel elements for block-type reactors. The downstream sector encompasses the various applications and back-end management of TRISO fuel. Its primary application is as fuel for Generation IV advanced reactors, particularly High-Temperature Gas-cooled Reactors, as well as Molten Salt Reactors, Microreactors, and space nuclear power systems. After use, the encapsulated spent fuel elements are destined for direct deep geological disposal or future recycling. Currently, specialized transport casks and final repository sites are critical components of the downstream sector.

The global pursuit of nuclear power with 'walk-away safety' is a primary driver. TRISO fuel's ability to retain fission products even under extreme temperatures (>1600°C) and without active cooling systems makes it the enabling technology for reactors that are physically incapable of a core meltdown.

TRISO is the preferred fuel for multiple Generation IV reactor designs, most notably High-Temperature Gas-cooled Reactors (HTGRs). As these advanced reactors move from demonstration to commercialization, they create a guaranteed and growing market for TRISO fuel.

The economics and siting flexibility of Small Modular Reactors (SMRs) and Microreactors rely on ultra-safe, long-lived core designs. TRISO-based cores are ideal for these applications, enabling deployment for remote power, industrial heat, and grid resilience.

There is a significant first-mover advantage in building a commercial-scale, reliable TRISO fuel supply chain outside of national labs. Companies that can achieve consistent, high-quality production at scale will capture a dominant market position.

NASA and defense agencies see TRISO as a key enabler for nuclear propulsion and power systems for space exploration and remote terrestrial bases, creating a specialized, high-value market.

This report is a detailed and comprehensive analysis for global TRISO Fuel 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 TRISO Fuel market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global TRISO Fuel market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global TRISO Fuel market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global TRISO Fuel market shares of main players, shipments in revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 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 TRISO Fuel

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 TRISO Fuel 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 BWX Technologies, Chinergy, X-energy, Framatome, etc.

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

**Market Segmentation**

TRISO Fuel 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

Spherical Fuel Element

Prismatic Fuel Element

Dispersed Fuel Components

#### Market segment by Nuclear Material

UCO

UO?

#### Market segment by Enrichment Level

LEU TRISO

HALEU TRISO

Fast Spectrum TRISO

#### Market segment by Safety Function

Containment Type

Ultra-safe/Ultra-temperature Resistant Type

#### Market segment by Application

High-temperature Gas-cooled Reactors

Other Reactors (Microreactors, Space Reactors, and other Experimental Reactors)

#### Major players covered

BWX Technologies

Chinergy

X-energy

Framatome

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 TRISO Fuel product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the TRISO Fuel 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 TRISO Fuel 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 TRISO Fuel.

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