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Global Blanket Shield Modules Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Blanket Shield Modules market size is predicted to grow from US$ 17.80 million in 2025 to US$ 50.00 million in 2032; it is expected to grow at a CAGR of 15.8% from 2026 to 2032.

The blanket shield module is one of the most critical core components located on the inner wall of the vacuum chamber in magnetic confinement fusion devices such as the International Thermonuclear Experimental Reactor (ITER). It plays a vital role in shielding against neutrons. If uncontrolled, the high-energy neutrons produced by the fusion reaction can severely damage the vacuum chamber walls and surrounding critical components such as the superconducting magnets. The shield module utilizes its material properties to effectively absorb and decelerate these high-energy neutrons, protecting the structural safety of the device.

Structurally, each cladding module mainly consists of a first wall, a shielding block, and flexible supports. The first wall directly faces the plasma and withstands extremely high heat flux; the shielding block is the main component for neutron shielding and heat dissipation. The main material for manufacturing the shielding block is 316LN stainless steel. Its manufacturing process is extremely complex, requiring a series of challenging steps such as forging large forgings, precision welding, and deep drilling (with hole diameters typically between 12-30 mm). A single module measures approximately 1 meter ? 1.5 meters and can weigh up to 4.6 tons. The entire cladding system has over 180 design variations to accommodate different positions on the inner wall of the vacuum chamber.

The blanket shielding module is a key internal structural component in magnetic confinement fusion devices, particularly tokamak fusion reactors. Primarily installed

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between the inner wall of the vacuum chamber and the superconducting magnet, it withstands the high-energy neutron radiation and heat load generated by the fusion plasma, while protecting the vacuum chamber, superconducting magnet, and other critical equipment from radiation damage. Unlike the shielding structures in traditional nuclear fission reactors, the fusion blanket shielding module not only performs radiation protection but also needs to fulfill multiple functions, including neutron energy conversion, tritium breeding, heat transfer, and structural support. It is a crucial core component for the future commercialization of fusion energy.

Global energy transition and low-carbon development goals are further driving investment in nuclear fusion technology. As a vital component of fusion reactors, the technology of the blanket shielding module is rapidly evolving. Future commercial fusion devices require the blanket system to not only withstand 14 MeV high-energy neutrons for extended periods but also achieve efficient tritium breeding and heat recovery. Therefore, traditional single-layer shielding structures are evolving towards multifunctional composite blankets. As fusion reactors evolve towards higher power and longer operating times, the focus of blanket shielding modules will increasingly shift towards materials with superior radiation resistance, thermal fatigue life, structural reliability, and remote maintenance capabilities.

Currently, blanket shielding modules are still in the research, verification, and engineering preparation stages, and have not yet formed a large-scale commercial market similar to traditional nuclear power equipment, but they possess significant future growth potential. Global research efforts are currently concentrated in ITER member countries, China, the United States, Europe, Japan, and South Korea, with each country advancing the development of Test Blanket Modules (TBMs) to verify tritium breeding performance, material stability, and thermal management capabilities. With the gradual construction of DEMO demonstration reactors and commercial fusion power plants over the next few decades, blanket shielding modules will transition from experimental equipment to standardized nuclear energy equipment.

Report Scope

LPI (LP Information)' newest research report, the “Blanket Shield Modules Industry Forecast” looks at past sales and reviews total world Blanket Shield Modules sales in 2025, providing a comprehensive analysis by region and market sector of projected Blanket Shield Modules sales for 2026 through 2032. With Blanket Shield Modules sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Blanket Shield Modules industry.

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This Insight Report provides a comprehensive analysis of the global Blanket Shield Modules landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Blanket Shield Modules portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Blanket Shield Modules market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Blanket Shield Modules and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Blanket Shield Modules.

This report presents a comprehensive overview, market shares, and growth opportunities of Blanket Shield Modules market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

Stainless Steel Shield Block

High-boron Steel Shield Block

Composite Shield Block

Others

Segmentation by Cooling Method:

Water-cooled Shield Block

Helium-cooled Shield Block

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Others

Segmentation by Application:

Fusion Experimental Reactors

Fusion Engineering & Demonstration Reactors

Commercial Fusion Power Plants

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

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- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

- EM Korea
- Dongfang Electric (Guangzhou) Heavy Machinery
- Guizhou Aerospace Xinli Technology
- Hefei Metalforming Intelligent Manufacturing

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Shanghai No.1 Machine Tool Works

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