

Global Nuclear Power Intelligent Robot Market Growth 2026-2032

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Abstracts

The global Nuclear Power Intelligent Robot market size is predicted to grow from US\$ 207 million in 2025 to US\$ 330 million in 2032; it is expected to grow at a CAGR of 7.1% from 2026 to 2032.

In 2024, global Nuclear Power Intelligent Robot production reached approximately 76 units, with an average global market price of around US\$ 2.58 million per unit. The Nuclear Power Intelligent Robot is a highly integrated robotic system used in the complex and unique environment of nuclear power plants to perform tasks such as inspection, maintenance, and emergency response. It integrates key technologies such as radiation protection, high-temperature and corrosion-resistant mechanical structures, multimodal sensing (e.g., radiation detection, thermal imaging), autonomous navigation and precise positioning, intelligent decision-making, and remote operation, possessing strong radiation resistance and high reliability. Its core functions include autonomous inspection and condition monitoring, equipment operation and maintenance, and accident environment detection and intervention, aiming to achieve 'machine replacement of human labor,' significantly reducing personnel radiation risks, and improving the safety and efficiency of nuclear power plant operation and maintenance. It is an important piece of equipment for the safe operation and intelligent upgrading of nuclear power plants.

The upstream supply chain mainly includes core component and raw material suppliers. Key component suppliers such as FANUC and KUKA (Midea Group) provide robotic arm bodies; Texas Instruments and Infineon supply high-performance servo drives and chips; SICK and Keyence provide radiation-hardened cameras and sensors; and Hamamatsu Photonics supplies radiation detectors. Specialty material suppliers such as Sandvik provide radiation-resistant alloys, and Toray provide special protective

composite materials. Downstream customers are highly concentrated, mainly consisting of major global nuclear power operators and engineering companies, including EDF, Rosatom, Westinghouse Electric, CGN, and Hitachi GE Nuclear Power. Its application scenarios cover four major areas: in-service inspection, routine maintenance, decommissioning and dismantling, and emergency response in nuclear power plants. The market is characterized by strong customization, high barriers to entry, and project-based procurement.

EDF's procurement of a Westinghouse steam generator inspection robot. This procurement project addressed the eddy current detection requirements of heat transfer tubes in a specific reactor model, employing a tracked crawling robot equipped with a dedicated probe arm. The project included customized robot development, on-site commissioning, and operator training, with a contract period spanning several years and a total value of several million US dollars, demonstrating the highly customized nature of nuclear power robot procurement and the integration of technical services.

The cost structure of Nuclear Power Intelligent Robot is primarily driven by R&D and customized engineering, typically accounting for over 50% of the total cost. This is followed by the procurement of core components (such as radiation-resistant sensors and specialized robotic arms) and specialized materials. System integration and testing costs also constitute a significant proportion under project-based models. Benefiting from high technological barriers and strong customer loyalty, industry leaders enjoy high gross profit margins, typically ranging from 30% to 50%, but these margins vary considerably depending on the technological complexity and procurement scale of specific projects.

The global market for Nuclear Power Intelligent Robot exhibits significant regional differentiation and a technology-driven landscape. Europe (represented by France and the UK), leveraging established nuclear power operators (such as EDF) and the demand from the decommissioning market, leads in reactor inspection and decommissioning robots with mature applications. North America (the US and Canada), with its strong industrial and military robot base, holds an advantage in technological innovation and complex system integration (such as Westinghouse Electric), while also experiencing a vibrant nuclear decommissioning market. The Asia-Pacific region is the core of growth: Japan possesses strong capabilities in radiation-resistant technology and precision inspection robots; the Chinese market is rapidly expanding with the launch of new nuclear power plant construction and decommissioning plans. Russia has its own technological system for applications in specific scenarios. The global market is dominated by a few specialized companies, characterized by high barriers to entry and

project-driven growth.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Nuclear Power Intelligent Robot 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 Nuclear Power Intelligent Robot.

This report presents a comprehensive overview, market shares, and growth opportunities of Nuclear Power Intelligent Robot market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Emergency Response Robot

Decontamination Cleaning Robot

In-service Inspection Robot

Segmentation by Autonomy:

- Remotely Operated Robot
- Semi-Autonomous Robot
- Fully Autonomous Intelligent Robot

Segmentation by Form:

- Wheeled/Tracked Mobile Robot
- Wall-Climbing/Pipe-Climbing Robot
- Underwater Robot
- Articular Arms Robot
- Others

Segmentation by Application:

- Reactor Building
- Fuel Operation and Storage Area
- Conventional Island and Peripheral Facilities
- Decommissioning and Waste Disposal
- Others

This report also splits the market by region:

- Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

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 analysing the company's coverage, product portfolio, its market penetration.

Boston Dynamics

FLIR

Huibo Robot Group

Nanjing TetraBOT Electronic Technology

Capgemini

Framatome

Createc

ENGIE Laborelec

KOKS Robotics

ANYbotics

Mitsubishi Heavy Industries

Diakont

KUKA

Westinghouse Electric Company

Hitachi

Key Questions Addressed in this Report

What is the 10-year outlook for the global Nuclear Power Intelligent Robot market?

What factors are driving Nuclear Power Intelligent Robot market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Nuclear Power Intelligent Robot market opportunities vary by end market size?

How does Nuclear Power Intelligent Robot break out by Type, by Application?

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