

Global Refueling Outage Services Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Refueling Outage Services market size is predicted to grow from US\$ 3355 million in 2025 to US\$ 5152 million in 2032; it is expected to grow at a CAGR of 6.3% from 2026 to 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.

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

This Insight Report provides a comprehensive analysis of the global Refueling Outage Services 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 Refueling Outage Services portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Refueling Outage Services market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Refueling Outage Services 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 Refueling Outage Services.

This report presents a comprehensive overview, market shares, and growth opportunities of Refueling Outage Services market by product type, application, key players and key regions and countries.

Segmentation by Type:

Fuel Replacement Services

Inspection and Testing Services

Equipment Maintenance Services

Upgrade and Modernization Services

Others

Segmentation by Cycle:

Short Cycle: <20 Days

Medium Cycle: 21–60 Days

Long Cycle: >60 Days

Segmentation by Application:

PWR

BWR

SMR

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

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

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