

Global Sodium-cooled Fast Reactor Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Sodium-cooled Fast Reactor market size is predicted to grow from US\$ 2020 million in 2025 to US\$ 3560 million in 2032; it is expected to grow at a CAGR of 8.5% from 2026 to 2032.

Sodium-cooled Fast Reactor (SFR) is an advanced Generation IV nuclear reactor technology that uses liquid sodium as the primary coolant and operates with a fast neutron spectrum. The technology relies on sodium's excellent thermal conductivity, low neutron absorption characteristics and high boiling point to enable high-temperature operation under near-atmospheric pressure conditions, improving thermal efficiency and fuel utilization. This research focuses on sodium-cooled fast reactor systems, including reactor designs, core technologies, fuel systems and related engineering solutions for advanced nuclear power generation, nuclear fuel breeding and long-term nuclear resource utilization.

Key Findings

Sodium-cooled Fast Reactors operate with liquid sodium coolant and fast neutron spectrum technology

Large-scale SFR designs above 700 MWe represent the major commercial development direction

Oxide fuel and metal fuel remain the primary technical routes for SFR deployment

Asia and Europe are key regions for sodium-cooled fast reactor technology development

SFR technology focuses on fuel sustainability waste reduction and advanced nuclear energy security

Market Insights

Market Trends

The sodium-cooled fast reactor industry is evolving toward higher safety performance, improved fuel utilization efficiency and integration with closed nuclear fuel cycles. Current technology development emphasizes passive safety systems, advanced materials, improved sodium handling technologies and enhanced operational reliability. Small modular sodium-cooled fast reactors are gaining attention due to their potential applications in distributed power supply, industrial energy and flexible grid integration, while large-scale systems continue to focus on commercial nuclear power deployment and fuel cycle optimization. Future technological progress is expected to concentrate on reducing construction complexity, improving economic competitiveness and accelerating demonstration projects.

Market Dynamics

Drivers

The development of sodium-cooled fast reactors is driven by increasing demand for sustainable nuclear energy solutions, concerns regarding uranium resource availability and the need for reducing long-lived radioactive waste. SFR technology provides higher fuel utilization potential through fuel breeding and recycling capabilities, supporting national strategies focused on energy security, carbon reduction and advanced nuclear technology development.

Restraints

The commercialization of sodium-cooled fast reactors faces challenges related to high construction costs, complex sodium coolant management, stringent safety requirements and long development cycles. Liquid sodium reacts strongly with water and air, requiring advanced engineering designs, specialized materials and comprehensive safety systems, which increase project complexity and investment requirements.

Opportunities

Sodium-cooled fast reactors have significant opportunities in advanced nuclear power programs, next-generation fuel cycle systems and long-term energy security strategies. The technology can support improved utilization of nuclear resources through plutonium recycling and fuel breeding, while emerging small-scale designs may create new opportunities for remote power supply, industrial applications and hybrid energy systems.

Challenges

The industry faces risks associated with technology maturity, regulatory approval processes, supply chain capability and public acceptance of advanced nuclear technologies. Large-scale deployment requires successful demonstration projects, stable policy support and continuous improvements in reactor economics, safety assurance and operational experience.

The sodium-cooled fast reactor industry chain consists of upstream nuclear materials and equipment suppliers, midstream reactor technology developers and engineering organizations, and downstream nuclear power operators. The upstream segment includes nuclear fuel materials, structural materials, sodium coolant systems, reactor components, control systems and specialized manufacturing equipment. The midstream segment covers reactor design, engineering integration, safety systems development and demonstration projects. The downstream segment mainly includes nuclear electricity generation, nuclear fuel cycle applications and advanced energy infrastructure. Value creation is concentrated in reactor design capability, nuclear engineering expertise, fuel cycle technology and large-scale project execution capabilities.

Value Chain Analysis

The value chain of sodium-cooled fast reactors is built around advanced reactor design, nuclear fuel management and long-term energy system integration. Core value is created through improvements in reactor safety, fuel efficiency, waste reduction and operational reliability. Companies and research organizations with capabilities in reactor physics, sodium technology, fuel development and nuclear engineering integration maintain stronger competitive positions within the industry ecosystem.

Segment Insights

By power scale, sodium-cooled fast reactors can be divided into small-scale, medium-scale and large-scale systems. Large-scale reactors above 700 MWe remain the primary focus for utility-scale nuclear power deployment due to their higher electricity generation capacity and compatibility with existing nuclear infrastructure. Small and medium-scale SFR designs are attracting increasing attention because of their flexibility, potential modular deployment and suitability for emerging energy applications. By fuel type, oxide-fueled reactors currently represent the most mature technology pathway, while metal-fueled and nitride-fueled systems are being developed to improve fuel performance, breeding capability and resource utilization efficiency.

Downstream Market Opportunities

The downstream market opportunities for sodium-cooled fast reactors are mainly concentrated in advanced nuclear electricity generation, nuclear fuel breeding systems and strategic energy infrastructure. Utilities, government nuclear programs and research institutions are key customers, with demand increasingly focused on technologies that improve fuel sustainability, reduce radioactive waste and support low-carbon energy transition. Future opportunities will expand through integration with closed fuel cycles, industrial energy applications and next-generation nuclear deployment programs.

Regional Insights

Sodium-cooled fast reactor development is mainly concentrated in Asia, Europe and North America, where governments and nuclear organizations maintain long-term advanced reactor development programs. Asia has become one of the most active regions due to strong nuclear energy expansion plans and technology investment, particularly in large-scale demonstration projects. Europe emphasizes advanced reactor safety, fuel cycle innovation and regulatory development, while North America focuses on commercialization of innovative designs and private-sector participation in advanced nuclear technologies.

Competitive Landscape Analysis

The sodium-cooled fast reactor market is characterized by competition among national nuclear technology organizations, reactor developers and engineering companies with long-term nuclear expertise. Leading participants include organizations involved in advanced reactor design, demonstration projects and fuel cycle technologies. Competition is primarily based on reactor safety performance, engineering capability, fuel technology, regulatory approval experience and project execution capacity. The

industry remains highly specialized, with significant entry barriers caused by nuclear licensing requirements, technical complexity and extensive capital investment needs.

Report Scope

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Sodium-cooled Fast Reactor 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 Sodium-cooled Fast Reactor.

This report presents a comprehensive overview, market shares, and growth opportunities of Sodium-cooled Fast Reactor market by product type, application, key players and key regions and countries.

Market Segmentation

Segmentation by Type:

Small-scale Sodium-cooled Fast Reactor (<300 MWe)

Medium-scale Sodium-cooled Fast Reactor (300–700 MWe)

Large-scale Sodium-cooled Fast Reactor (>700 MWe)

Segmentation by Fuel Type:

Oxide-Fueled Sodium-Cooled Fast Reactor

Metal-Fueled Sodium-Cooled Fast Reactor

Nitride-Fueled Sodium-Cooled Fast Reactor

Segmentation by Application:

Nuclear Power Generation

Nuclear Fuel Breeding

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.

TerraPower

Rosatom

Atomenergoproekt

CNNC

Hitachi Energy

OKBM Afrikantov

BHAVINI

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Sodium-cooled Fast Reactor Market Size (2021-2032)
 - 2.1.2 Sodium-cooled Fast Reactor Market Size CAGR by Region (2021 VS 2025 VS 2032)
 - 2.1.3 World Current & Future Analysis for Sodium-cooled Fast Reactor by Country/Region (2021, 2025 & 2032)
- 2.2 Sodium-cooled Fast Reactor Segment by Type
 - 2.2.1 Small-scale Sodium-cooled Fast Reactor (<300 MWe)
 - 2.2.2 Medium-scale Sodium-cooled Fast Reactor (300–700 MWe)
 - 2.2.3 Large-scale Sodium-cooled Fast Reactor (>700 MWe)
 - 2.2.4 Sodium-cooled Fast Reactor Market Size by Type
 - 2.2.4.1 Sodium-cooled Fast Reactor Market Size CAGR by Type (2021 VS 2025 VS 2032)
 - 2.2.4.2 Global Sodium-cooled Fast Reactor Market Size Market Share by Type (2021-2026)
- 2.3 Sodium-cooled Fast Reactor Segment by Fuel Type
 - 2.3.1 Oxide-Fueled Sodium-Cooled Fast Reactor
 - 2.3.2 Metal-Fueled Sodium-Cooled Fast Reactor
 - 2.3.3 Nitride-Fueled Sodium-Cooled Fast Reactor
 - 2.3.4 Sodium-cooled Fast Reactor Market Size by Fuel Type
 - 2.3.4.1 Sodium-cooled Fast Reactor Market Size CAGR by Fuel Type (2021 VS 2025 VS 2032)
 - 2.3.4.2 Global Sodium-cooled Fast Reactor Market Size Market Share by Fuel Type (2021-2026)

2.4 Sodium-cooled Fast Reactor Segment by Application

2.4.1 Nuclear Power Generation

2.4.2 Nuclear Fuel Breeding

2.4.3 Others

2.4.4 Sodium-cooled Fast Reactor Market Size by Application

2.4.4.1 Sodium-cooled Fast Reactor Market Size CAGR by Application (2021 VS 2025 VS 2032)

2.4.4.2 Global Sodium-cooled Fast Reactor Market Size Market Share by Application (2021-2026)

3 SODIUM-COOLED FAST REACTOR MARKET SIZE BY PLAYER

3.1 Sodium-cooled Fast Reactor Market Size Market Share by Player

3.1.1 Global Sodium-cooled Fast Reactor Revenue by Player (2021-2026)

3.1.2 Global Sodium-cooled Fast Reactor Revenue Market Share by Player (2021-2026)

3.2 Global Sodium-cooled Fast Reactor Key Players Head office and Products Offered

3.3 Market Concentration Rate Analysis

3.3.1 Competition Landscape Analysis

3.3.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.4 New Products and Potential Entrants

3.5 Mergers & Acquisitions, Expansion

4 SODIUM-COOLED FAST REACTOR BY REGION

4.1 Sodium-cooled Fast Reactor Market Size by Region (2021-2026)

4.2 Global Sodium-cooled Fast Reactor Annual Revenue by Country/Region (2021-2026)

4.3 Americas Sodium-cooled Fast Reactor Market Size Growth (2021-2026)

4.4 APAC Sodium-cooled Fast Reactor Market Size Growth (2021-2026)

4.5 Europe Sodium-cooled Fast Reactor Market Size Growth (2021-2026)

4.6 Middle East & Africa Sodium-cooled Fast Reactor Market Size Growth (2021-2026)

5 AMERICAS

5.1 Americas Sodium-cooled Fast Reactor Market Size by Country (2021-2026)

5.2 Americas Sodium-cooled Fast Reactor Market Size by Type (2021-2026)

5.3 Americas Sodium-cooled Fast Reactor Market Size by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Sodium-cooled Fast Reactor Market Size by Region (2021-2026)

6.2 APAC Sodium-cooled Fast Reactor Market Size by Type (2021-2026)

6.3 APAC Sodium-cooled Fast Reactor Market Size by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

7 EUROPE

7.1 Europe Sodium-cooled Fast Reactor Market Size by Country (2021-2026)

7.2 Europe Sodium-cooled Fast Reactor Market Size by Type (2021-2026)

7.3 Europe Sodium-cooled Fast Reactor Market Size by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Sodium-cooled Fast Reactor by Region (2021-2026)

8.2 Middle East & Africa Sodium-cooled Fast Reactor Market Size by Type (2021-2026)

8.3 Middle East & Africa Sodium-cooled Fast Reactor Market Size by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 GLOBAL SODIUM-COOLED FAST REACTOR MARKET FORECAST

10.1 Global Sodium-cooled Fast Reactor Forecast by Region (2027-2032)

10.1.1 Global Sodium-cooled Fast Reactor Forecast by Region (2027-2032)

10.1.2 Americas Sodium-cooled Fast Reactor Forecast

10.1.3 APAC Sodium-cooled Fast Reactor Forecast

10.1.4 Europe Sodium-cooled Fast Reactor Forecast

10.1.5 Middle East & Africa Sodium-cooled Fast Reactor Forecast

10.2 Americas Sodium-cooled Fast Reactor Forecast by Country (2027-2032)

10.2.1 United States Market Sodium-cooled Fast Reactor Forecast

10.2.2 Canada Market Sodium-cooled Fast Reactor Forecast

10.2.3 Mexico Market Sodium-cooled Fast Reactor Forecast

10.2.4 Brazil Market Sodium-cooled Fast Reactor Forecast

10.3 APAC Sodium-cooled Fast Reactor Forecast by Region (2027-2032)

10.3.1 China Sodium-cooled Fast Reactor Market Forecast

10.3.2 Japan Market Sodium-cooled Fast Reactor Forecast

10.3.3 Korea Market Sodium-cooled Fast Reactor Forecast

10.3.4 Southeast Asia Market Sodium-cooled Fast Reactor Forecast

10.3.5 India Market Sodium-cooled Fast Reactor Forecast

10.3.6 Australia Market Sodium-cooled Fast Reactor Forecast

10.4 Europe Sodium-cooled Fast Reactor Forecast by Country (2027-2032)

10.4.1 Germany Market Sodium-cooled Fast Reactor Forecast

10.4.2 France Market Sodium-cooled Fast Reactor Forecast

10.4.3 UK Market Sodium-cooled Fast Reactor Forecast

10.4.4 Italy Market Sodium-cooled Fast Reactor Forecast

10.4.5 Russia Market Sodium-cooled Fast Reactor Forecast

10.5 Middle East & Africa Sodium-cooled Fast Reactor Forecast by Region (2027-2032)

10.5.1 Egypt Market Sodium-cooled Fast Reactor Forecast

10.5.2 South Africa Market Sodium-cooled Fast Reactor Forecast

10.5.3 Israel Market Sodium-cooled Fast Reactor Forecast

10.5.4 Turkey Market Sodium-cooled Fast Reactor Forecast

10.6 Global Sodium-cooled Fast Reactor Forecast by Type (2027-2032)

10.7 Global Sodium-cooled Fast Reactor Forecast by Application (2027-2032)

10.7.1 GCC Countries Market Sodium-cooled Fast Reactor Forecast

11 KEY PLAYERS ANALYSIS

11.1 TerraPower

11.1.1 TerraPower Company Information

11.1.2 TerraPower Sodium-cooled Fast Reactor Product Offered

11.1.3 TerraPower Sodium-cooled Fast Reactor Revenue, Gross Margin and Market Share (2021-2026)

11.1.4 TerraPower Main Business Overview

11.1.5 TerraPower Latest Developments

11.2 Rosatom

11.2.1 Rosatom Company Information

11.2.2 Rosatom Sodium-cooled Fast Reactor Product Offered

11.2.3 Rosatom Sodium-cooled Fast Reactor Revenue, Gross Margin and Market Share (2021-2026)

11.2.4 Rosatom Main Business Overview

11.2.5 Rosatom Latest Developments

11.3 Atomenergoproekt

11.3.1 Atomenergoproekt Company Information

11.3.2 Atomenergoproekt Sodium-cooled Fast Reactor Product Offered

11.3.3 Atomenergoproekt Sodium-cooled Fast Reactor Revenue, Gross Margin and Market Share (2021-2026)

11.3.4 Atomenergoproekt Main Business Overview

11.3.5 Atomenergoproekt Latest Developments

11.4 CNNC

11.4.1 CNNC Company Information

11.4.2 CNNC Sodium-cooled Fast Reactor Product Offered

11.4.3 CNNC Sodium-cooled Fast Reactor Revenue, Gross Margin and Market Share (2021-2026)

11.4.4 CNNC Main Business Overview

11.4.5 CNNC Latest Developments

11.5 Hitachi Energy

11.5.1 Hitachi Energy Company Information

11.5.2 Hitachi Energy Sodium-cooled Fast Reactor Product Offered

11.5.3 Hitachi Energy Sodium-cooled Fast Reactor Revenue, Gross Margin and Market Share (2021-2026)

11.5.4 Hitachi Energy Main Business Overview

11.5.5 Hitachi Energy Latest Developments

11.6 OKBM Afrikantov

11.6.1 OKBM Afrikantov Company Information

11.6.2 OKBM Afrikantov Sodium-cooled Fast Reactor Product Offered

11.6.3 OKBM Afrikantov Sodium-cooled Fast Reactor Revenue, Gross Margin and Market Share (2021-2026)

11.6.4 OKBM Afrikantov Main Business Overview

11.6.5 OKBM Afrikantov Latest Developments

11.7 BHAVINI

11.7.1 BHAVINI Company Information

11.7.2 BHAVINI Sodium-cooled Fast Reactor Product Offered

11.7.3 BHAVINI Sodium-cooled Fast Reactor Revenue, Gross Margin and Market Share (2021-2026)

11.7.4 BHAVINI Main Business Overview

11.7.5 BHAVINI Latest Developments

12 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Sodium-cooled Fast Reactor Market Size CAGR by Region (2021 VS 2025 VS 2032) & (\$ millions)

Table 2. Sodium-cooled Fast Reactor Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Small-scale Sodium-cooled Fast Reactor (<300 MWe)

Table 4. Major Players of Medium-scale Sodium-cooled Fast Reactor (300–700 MWe)

Table 5. Major Players of Large-scale Sodium-cooled Fast Reactor (>700 MWe)

Table 6. Sodium-cooled Fast Reactor Market Size CAGR by Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 7. Global Sodium-cooled Fast Reactor Market Size by Type (2021-2026) & (\$ millions)

Table 8. Global Sodium-cooled Fast Reactor Market Size Market Share by Type (2021-2026)

Table 9. Major Players of Oxide-Fueled Sodium-Cooled Fast Reactor

Table 10. Major Players of Metal-Fueled Sodium-Cooled Fast Reactor

Table 11. Major Players of Nitride-Fueled Sodium-Cooled Fast Reactor

Table 12. Sodium-cooled Fast Reactor Market Size CAGR by Fuel Type (2021 VS 2025 VS 2032) & (\$ millions)

Table 13. Global Sodium-cooled Fast Reactor Market Size by Fuel Type (2021-2026) & (\$ millions)

Table 14. Global Sodium-cooled Fast Reactor Market Size Market Share by Fuel Type (2021-2026)

Table 15. Sodium-cooled Fast Reactor Market Size CAGR by Application (2021 VS 2025 VS 2032) & (\$ millions)

Table 16. Global Sodium-cooled Fast Reactor Market Size by Application (2021-2026) & (\$ millions)

Table 17. Global Sodium-cooled Fast Reactor Market Size Market Share by Application (2021-2026)

Table 18. Global Sodium-cooled Fast Reactor Revenue by Player (2021-2026) & (\$ millions)

Table 19. Global Sodium-cooled Fast Reactor Revenue Market Share by Player (2021-2026)

Table 20. Sodium-cooled Fast Reactor Key Players Head office and Products Offered

Table 21. Sodium-cooled Fast Reactor Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 22. New Products and Potential Entrants

Table 23. Mergers & Acquisitions, Expansion

Table 24. Global Sodium-cooled Fast Reactor Market Size by Region (2021-2026) & (\$ millions)

Table 25. Global Sodium-cooled Fast Reactor Market Size Market Share by Region (2021-2026)

Table 26. Global Sodium-cooled Fast Reactor Revenue by Country/Region (2021-2026) & (\$ millions)

Table 27. Global Sodium-cooled Fast Reactor Revenue Market Share by Country/Region (2021-2026)

Table 28. Americas Sodium-cooled Fast Reactor Market Size by Country (2021-2026) & (\$ millions)

Table 29. Americas Sodium-cooled Fast Reactor Market Size Market Share by Country (2021-2026)

Table 30. Americas Sodium-cooled Fast Reactor Market Size by Type (2021-2026) & (\$ millions)

Table 31. Americas Sodium-cooled Fast Reactor Market Size Market Share by Type (2021-2026)

Table 32. Americas Sodium-cooled Fast Reactor Market Size by Application (2021-2026) & (\$ millions)

Table 33. Americas Sodium-cooled Fast Reactor Market Size Market Share by Application (2021-2026)

Table 34. APAC Sodium-cooled Fast Reactor Market Size by Region (2021-2026) & (\$ millions)

Table 35. APAC Sodium-cooled Fast Reactor Market Size Market Share by Region (2021-2026)

Table 36. APAC Sodium-cooled Fast Reactor Market Size by Type (2021-2026) & (\$ millions)

Table 37. APAC Sodium-cooled Fast Reactor Market Size by Application (2021-2026) & (\$ millions)

Table 38. Europe Sodium-cooled Fast Reactor Market Size by Country (2021-2026) & (\$ millions)

Table 39. Europe Sodium-cooled Fast Reactor Market Size Market Share by Country (2021-2026)

Table 40. Europe Sodium-cooled Fast Reactor Market Size by Type (2021-2026) & (\$ millions)

Table 41. Europe Sodium-cooled Fast Reactor Market Size by Application (2021-2026) & (\$ millions)

Table 42. Middle East & Africa Sodium-cooled Fast Reactor Market Size by Region

(2021-2026) & (\$ millions)

Table 43. Middle East & Africa Sodium-cooled Fast Reactor Market Size by Type

(2021-2026) & (\$ millions)

Table 44. Middle East & Africa Sodium-cooled Fast Reactor Market Size by Application

(2021-2026) & (\$ millions)

Table 45. Key Market Drivers & Growth Opportunities of Sodium-cooled Fast Reactor

Table 46. Key Market Challenges & Risks of Sodium-cooled Fast Reactor

Table 47. Key Industry Trends of Sodium-cooled Fast Reactor

Table 48. Global Sodium-cooled Fast Reactor Market Size Forecast by Region

(2027-2032) & (\$ millions)

Table 49. Global Sodium-cooled Fast Reactor Market Size Market Share Forecast by Region (2027-2032)

Table 50. Global Sodium-cooled Fast Reactor Market Size Forecast by Type (2027-2032) & (\$ millions)

Table 51. Global Sodium-cooled Fast Reactor Market Size Forecast by Application (2027-2032) & (\$ millions)

Table 52. TerraPower Details, Company Type, Sodium-cooled Fast Reactor Area Served and Its Competitors

Table 53. TerraPower Sodium-cooled Fast Reactor Product Offered

Table 54. TerraPower Sodium-cooled Fast Reactor Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 55. TerraPower Main Business

Table 56. TerraPower Latest Developments

Table 57. Rosatom Details, Company Type, Sodium-cooled Fast Reactor Area Served and Its Competitors

Table 58. Rosatom Sodium-cooled Fast Reactor Product Offered

Table 59. Rosatom Sodium-cooled Fast Reactor Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 60. Rosatom Main Business

Table 61. Rosatom Latest Developments

Table 62. Atomenergoproekt Details, Company Type, Sodium-cooled Fast Reactor Area Served and Its Competitors

Table 63. Atomenergoproekt Sodium-cooled Fast Reactor Product Offered

Table 64. Atomenergoproekt Sodium-cooled Fast Reactor Revenue (\$ million), Gross Margin and Market Share (2021-2026)

Table 65. Atomenergoproekt Main Business

Table 66. Atomenergoproekt Latest Developments

Table 67. CNNC Details, Company Type, Sodium-cooled Fast Reactor Area Served and Its Competitors

Table 68. CNNC Sodium-cooled Fast Reactor Product Offered
Table 69. CNNC Sodium-cooled Fast Reactor Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 70. CNNC Main Business
Table 71. CNNC Latest Developments
Table 72. Hitachi Energy Details, Company Type, Sodium-cooled Fast Reactor Area Served and Its Competitors
Table 73. Hitachi Energy Sodium-cooled Fast Reactor Product Offered
Table 74. Hitachi Energy Sodium-cooled Fast Reactor Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 75. Hitachi Energy Main Business
Table 76. Hitachi Energy Latest Developments
Table 77. OKBM Afrikantov Details, Company Type, Sodium-cooled Fast Reactor Area Served and Its Competitors
Table 78. OKBM Afrikantov Sodium-cooled Fast Reactor Product Offered
Table 79. OKBM Afrikantov Sodium-cooled Fast Reactor Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 80. OKBM Afrikantov Main Business
Table 81. OKBM Afrikantov Latest Developments
Table 82. BHAVINI Details, Company Type, Sodium-cooled Fast Reactor Area Served and Its Competitors
Table 83. BHAVINI Sodium-cooled Fast Reactor Product Offered
Table 84. BHAVINI Sodium-cooled Fast Reactor Revenue (\$ million), Gross Margin and Market Share (2021-2026)
Table 85. BHAVINI Main Business
Table 86. BHAVINI Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Sodium-cooled Fast Reactor Report Years Considered
- Figure 2. Research Objectives
- Figure 3. Research Methodology
- Figure 4. Research Process and Data Source
- Figure 5. Global Sodium-cooled Fast Reactor Market Size Growth Rate (2021-2032) (\$ millions)
- Figure 6. Sodium-cooled Fast Reactor Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 7. Sodium-cooled Fast Reactor Sales Market Share by Country/Region (2025)
- Figure 8. Sodium-cooled Fast Reactor Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 9. Global Sodium-cooled Fast Reactor Market Size Market Share by Type in 2025
- Figure 10. Global Sodium-cooled Fast Reactor Market Size Market Share by Fuel Type in 2025
- Figure 11. Sodium-cooled Fast Reactor in Nuclear Power Generation
- Figure 12. Global Sodium-cooled Fast Reactor Market: Nuclear Power Generation (2021-2026) & (\$ millions)
- Figure 13. Sodium-cooled Fast Reactor in Nuclear Fuel Breeding
- Figure 14. Global Sodium-cooled Fast Reactor Market: Nuclear Fuel Breeding (2021-2026) & (\$ millions)
- Figure 15. Sodium-cooled Fast Reactor in Others
- Figure 16. Global Sodium-cooled Fast Reactor Market: Others (2021-2026) & (\$ millions)
- Figure 17. Global Sodium-cooled Fast Reactor Market Size Market Share by Application in 2025
- Figure 18. Global Sodium-cooled Fast Reactor Revenue Market Share by Player in 2025
- Figure 19. Global Sodium-cooled Fast Reactor Market Size Market Share by Region (2021-2026)
- Figure 20. Americas Sodium-cooled Fast Reactor Market Size 2021-2026 (\$ millions)
- Figure 21. APAC Sodium-cooled Fast Reactor Market Size 2021-2026 (\$ millions)
- Figure 22. Europe Sodium-cooled Fast Reactor Market Size 2021-2026 (\$ millions)
- Figure 23. Middle East & Africa Sodium-cooled Fast Reactor Market Size 2021-2026 (\$ millions)

Figure 24. Americas Sodium-cooled Fast Reactor Value Market Share by Country in 2025

Figure 25. United States Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 26. Canada Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 27. Mexico Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 28. Brazil Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 29. APAC Sodium-cooled Fast Reactor Market Size Market Share by Region in 2025

Figure 30. APAC Sodium-cooled Fast Reactor Market Size Market Share by Type (2021-2026)

Figure 31. APAC Sodium-cooled Fast Reactor Market Size Market Share by Application (2021-2026)

Figure 32. China Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 33. Japan Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 34. South Korea Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 35. Southeast Asia Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 36. India Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 37. Australia Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 38. Europe Sodium-cooled Fast Reactor Market Size Market Share by Country in 2025

Figure 39. Europe Sodium-cooled Fast Reactor Market Size Market Share by Type (2021-2026)

Figure 40. Europe Sodium-cooled Fast Reactor Market Size Market Share by Application (2021-2026)

Figure 41. Germany Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 42. France Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 43. UK Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 44. Italy Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 45. Russia Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 46. Middle East & Africa Sodium-cooled Fast Reactor Market Size Market Share by Region (2021-2026)

Figure 47. Middle East & Africa Sodium-cooled Fast Reactor Market Size Market Share by Type (2021-2026)

Figure 48. Middle East & Africa Sodium-cooled Fast Reactor Market Size Market Share by Application (2021-2026)

Figure 49. Egypt Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 50. South Africa Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 51. Israel Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 52. Turkey Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 53. GCC Countries Sodium-cooled Fast Reactor Market Size Growth 2021-2026 (\$ millions)

Figure 54. Americas Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 55. APAC Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 56. Europe Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 57. Middle East & Africa Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 58. United States Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 59. Canada Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 60. Mexico Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 61. Brazil Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 62. China Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 63. Japan Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 64. Korea Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 65. Southeast Asia Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 66. India Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 67. Australia Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 68. Germany Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 69. France Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

Figure 70. UK Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

- Figure 71. Italy Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)
- Figure 72. Russia Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)
- Figure 73. Egypt Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)
- Figure 74. South Africa Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)
- Figure 75. Israel Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)
- Figure 76. Turkey Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)
- Figure 77. Global Sodium-cooled Fast Reactor Market Size Market Share Forecast by Type (2027-2032)
- Figure 78. Global Sodium-cooled Fast Reactor Market Size Market Share Forecast by Application (2027-2032)
- Figure 79. GCC Countries Sodium-cooled Fast Reactor Market Size 2027-2032 (\$ millions)

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