

Nuclear Energy Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (Single-phase hybrid, Three-phase hybrid), By End User (Residential, Commercial, Others), By Region, Competition 2018-2028

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Abstracts

Global Nuclear Energy Market has valued at USD 34.72 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 3.6% through 2028. These are the primary facilities where nuclear energy is generated. Nuclear reactors within power plants use controlled nuclear fission reactions to produce heat, which is then used to generate steam and turn turbines to produce electricity. The nuclear fuel supply chain involves the extraction, processing, and transportation of uranium or other fissile materials to fuel fabrication facilities. This includes mining and milling operations, conversion, enrichment, and fuel assembly manufacturing. This sector includes the day-to-day operation, maintenance, and safety management of nuclear power plants. It involves highly specialized personnel, safety protocols, and technical expertise to ensure the safe and efficient operation of reactors. Research and development efforts in nuclear technology focus on improving reactor designs, enhancing safety features, and developing new materials and fuels to make nuclear energy more efficient and safer. The nuclear energy market includes services related to the storage, treatment, and disposal of radioactive waste generated during the operation of nuclear power plants. This involves long-term planning and secure storage solutions for nuclear waste. Government agencies and regulatory bodies oversee and regulate the nuclear energy sector to ensure safety, security, and compliance with environmental regulations. Some countries export nuclear technology, equipment, and expertise to other nations looking to develop or expand their nuclear energy capabilities. This can include reactor construction, fuel supply, and technical support. Innovations in nuclear energy, such as Small Modular Reactors (SMRs) and advanced reactor

designs, are also part of the market as they offer potential solutions to some of the challenges associated with traditional nuclear power plants. The nuclear energy market is influenced by global factors, including geopolitical considerations, international agreements on non-proliferation, and climate change mitigation goals. Government policies, subsidies, and incentives can significantly impact the growth and development of the nuclear energy sector within specific countries. Public opinion and advocacy groups play a role in shaping the nuclear energy market, influencing government decisions, project approvals, and funding allocations. Nuclear energy is a source of energy for the generation of electricity that is used nuclear power plants. Two types of nuclear reactions required to produce energy include nuclear fission and nuclear fusion. Both of the reactions generate heat; however, nuclear fission is employed in the power plants. In a nuclear fission reaction, a heavy atom of uranium is broken down into smaller nuclei releasing immense amount of energy. This energy is used for the production of electricity in a nuclear power plant. Nuclear energy is considered to be a clean source of energy in comparison to the fossil fuels, as there is no emission of any harmful gases or pollutants; however, the disposition of toxic nuclear wastes is a major concern for the power plants.

Key Market Drivers

One of the primary drivers of the nuclear energy market is its low greenhouse gas emissions. Nuclear power plants emit minimal carbon dioxide (CO₂) during electricity generation, making them an attractive option for reducing emissions in the fight against climate change. This is particularly important as countries strive to meet carbon reduction targets set under international agreements like the Paris Agreement. Nuclear energy provides a stable and reliable source of baseload power. Unlike some renewable energy sources like wind and solar, nuclear plants can operate continuously, ensuring a steady supply of electricity to meet the constant demand for power.

Energy Security

Many nations view nuclear energy as a way to enhance energy security by reducing dependence on fossil fuel imports. It can help diversify energy sources and reduce vulnerability to supply disruptions or price fluctuations in the global energy market. Uranium, the primary fuel used in nuclear reactors, is relatively abundant and can provide a long-term source of energy. This fuel availability reduces concerns about resource depletion compared to fossil fuels.

Technological Advancements

Advances in nuclear reactor design and technology have led to improved safety features, increased efficiency, and reduced operating costs. These developments have revitalized interest in nuclear energy. In some countries, government policies and incentives play a significant role in promoting nuclear energy. These may include subsidies, tax benefits, or emissions reduction targets that encourage investment in nuclear power. As global energy demand continues to rise, nuclear power can help meet this demand, particularly in emerging economies seeking to expand their electricity generation capacity.

Decommissioning and Waste Management

The need to decommission older nuclear facilities and manage nuclear waste responsibly is also a driver. Innovative solutions for waste disposal and recycling can influence the industry's growth. The nuclear energy market is characterized by a balance between its potential benefits, such as low carbon emissions and reliable baseload power, and its challenges, including safety concerns, high initial capital costs, and the long-term management of nuclear waste. The market's dynamics can vary from one region or country to another, depending on factors like energy demand, government policies, and the availability of alternative energy sources. It's essential to note that the nuclear energy market is subject to ongoing developments, technological advancements, and shifts in global energy priorities.

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Key Market Challenges

Challenges of the Nuclear Energy Market

Despite the growing demand for nuclear energy, the industry faces a number of challenges, including:

High upfront costs: Building new nuclear power plants is very expensive, with construction costs often exceeding USD10 billion. This can make it difficult for nuclear power plants to compete with other forms of energy, such as natural gas and renewable energy sources. It can take many years to build a new nuclear power plant. This can be a major disadvantage in a rapidly changing energy market. Although nuclear power plants are very safe, there is always a risk of a nuclear accident. The Chernobyl and Fukushima Daiichi disasters have raised public concerns about nuclear safety. Nuclear power plants produce radioactive waste, which needs to be carefully managed and disposed of. This is a complex and challenging task, and there is no long-term solution for nuclear waste disposal yet.

In addition to the challenges listed above, the nuclear energy market also faces a number of other challenges, such as:

There is some public opposition to nuclear power, particularly in countries that have experienced nuclear accidents. The regulatory environment for nuclear power can be complex and uncertain. This can make it difficult for nuclear power companies to plan for the future. Nuclear power plants face competition from other forms of energy, such as natural gas, renewable energy sources, and energy efficiency measures. The nuclear energy industry is working to overcome the challenges it faces. For example, nuclear power companies are developing new reactor technologies that are more cost-effective and safer to operate. They are also working to develop new solutions for nuclear waste disposal. Governments can also play a role in supporting the nuclear energy industry. For example, they can provide financial incentives for the construction of new nuclear power plants and develop clear and stable regulatory frameworks. The nuclear energy market is expected to grow significantly in the coming years, driven by factors such as increasing global energy demand, rising concerns about climate change, and the need to reduce reliance on fossil fuels. However, the industry faces a number of challenges, such as high upfront costs, long construction times, safety concerns, and nuclear waste disposal.

The nuclear energy industry is working to overcome these challenges, and governments can also play a role in supporting the industry. If the challenges can be overcome, nuclear energy can play a major role in meeting the world's growing energy needs and reducing greenhouse gas emissions.

Key Market Trends

Advanced Reactor Technologies

One prominent trend in the nuclear energy market is the development and deployment of advanced reactor technologies. These advanced designs aim to address some of the challenges associated with traditional nuclear reactors. Generation IV reactors are a new class of advanced nuclear reactors designed with improved safety features, increased fuel efficiency, and reduced waste production. Examples include molten salt reactors and sodium-cooled fast reactors. HTGRs operate at much higher temperatures than conventional reactors and have applications beyond electricity generation, such as hydrogen production and process heat for industrial applications. Thorium-based nuclear reactors have gained attention for their potential to use thorium as a more abundant and safer fuel source compared to uranium. Research and development in this area have been ongoing. Fast Neutron Reactors: Fast neutron reactors can utilize nuclear fuel more efficiently and reduce the long-term radioactivity of nuclear waste. They are considered a potential solution for recycling nuclear waste.

Small Modular Reactors (SMRs)

SMRs are compact, scalable nuclear reactors that offer several advantages over traditional large-scale reactors: SMRs can be deployed in various sizes, making them suitable for a range of applications, from remote communities to industrial facilities. SMRs often incorporate passive safety features, reducing the risk of accidents and mitigating their consequences. The modular nature of SMRs allows for quicker construction and deployment compared to large reactors. SMRs are designed to be cost-competitive with other energy sources, potentially reducing the high upfront capital costs associated with traditional reactors.

Segmental Insights

Type Insights

Nuclear energy is released from the nucleus or the core of an atom of protons and neutrons. Nuclear energy can be produced either in nuclear fission (when the nuclei of atoms split into several parts) or by fusion (when nuclei fuse). In today's world, nuclear fission produces electricity, while nuclear fusion technology produces power in the research & development (R&D) phase. As of 2021, the global nuclear power generation was about 2,653 TWh compared to around 2,553 TWh in 2020. The growing population and the economy, coupled with rapid urbanization globally, are expected to increase energy demand significantly in the coming years. The global primary energy demand in

2020 reached more than 556 exajoules, witnessing a 10% increase compared to about 505 exajoules in 2010. According to the International Energy Agency (IEA), global energy needs are expected to rise by 26% by 2050. The global electricity demand is likely to double due to emerging and developing economies. As of October 2022, about 437 commercial nuclear power plants were operating across 32 countries. The United States has the highest nuclear electricity generation capacity. France has the second-highest nuclear electricity generation capacity. Therefore, the energy segment is expected to dominate the nuclear power market during the forecast period due to the abovementioned points.

Regional Insights

The North America region has established itself as the leader in the Global Nuclear Energy Market with a significant revenue share in 2022. North America is the largest producer of nuclear energy with U.S. leading the nuclear energy market with 30% market share. The Asia-Pacific region is expected to witness a steady growth with nations such as India and China investing on their research for better output.

Key Market Players

Exelon Corporation

EDF (Electricit? de France)

Rosatom

Toshiba

Westinghouse Electric Company

China National Nuclear Corporation (CNNC)

AREVA (now Orano)

Korea Electric Power Corporation (KEPCO)

Hitachi-GE Nuclear Energy

Nuclear Power Corporation of India Limited (NPCIL)

Report Scope:

In this report, the Global Nuclear Energy Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Nuclear Energy Market, By Type:

Pressurized Water Reactor

Boiling Water Reactor

Fast Breeder Reactor

Advanced Gas Cooled Reactor

Uranium Reactor

Global Nuclear Energy Market, By Fuel:

Uranium-235

Uranium-233

Plutonium-239

Global Nuclear Energy Market, By Application:

Energy

Defense

Other Applications

Global Nuclear Energy Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Nuclear Energy Market.

Available Customizations:

Global Nuclear Energy Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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