

Nuclear Groups – World

Market Analysis – 2016-2019 Trends – Corporate Strategies

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Exclusive extracts from this 213 page-long report:

- What is the business?

The nuclear power industry comprises three core businesses: fuel cycle activities (uranium mining, fuel fabrication, reprocessing and recycling, waste disposal etc.), reactor design and construction activities, and nuclear plant operation (power generation). Most nuclear power companies focus on one or few of these activities, as a high degree of vertical integration rarely generates significant synergies or competitive benefits. [...]

- Who are the key players?

Leading players of the nuclear power industry can be classified into three categories: energy utilities which mostly focus on reactor design and plant operation; diversified power equipment groups which provide designs, equipment and solutions for several power systems; and nuclear power pure players which focus on one or several activities of the nuclear power value chain. [...]

Nuclear power companies analysed in the report include: **AREVA, ENGIE, EDF, KEPSCO, ROSATOM, CNNC, GE, MHI (MITSUBISHI), HITACHI, TOSHIBA, CAMECO, URENCO, KAZATOMPROM, and CGN.**

- How intense is competition?

Competitive rivalry has intensified in recent years in the context of rising nuclear power project costs and increased market liberalisation. State-backed emerging market players have been particularly successful in taking a growing share in new plant projects thanks to their greater cost-competitiveness and better project financing solutions. Nevertheless, competition is also partly offset by increasingly common partnerships between nuclear power groups seeking synergies on specific projects or markets. [...]

- What are the main markets?

Europe keeps the largest share in global nuclear power consumption as new capacity investments and expansion projects in Eastern Europe (including Russia) offset multiple shutdowns and project cancellations in Western European countries. Similarly, Asia's share in worldwide nuclear power generation will increase amid ambitious capacity expansion programs in China and India as well as Japan's decision to gradually restart its nuclear reactor fleet. [...]

To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

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