

Global Opportunities and the Supply Chain

**King Lee, Head of Policy and Industry
Engagement**

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World Nuclear Outlook Report 2026

World Nuclear Outlook Report provides in-depth analysis and strategic insights into the global nuclear energy development.

The report provides:

Global performance highlights for 2025

Global results previously in World Nuclear Performance Report

Global outlook for nuclear capacity

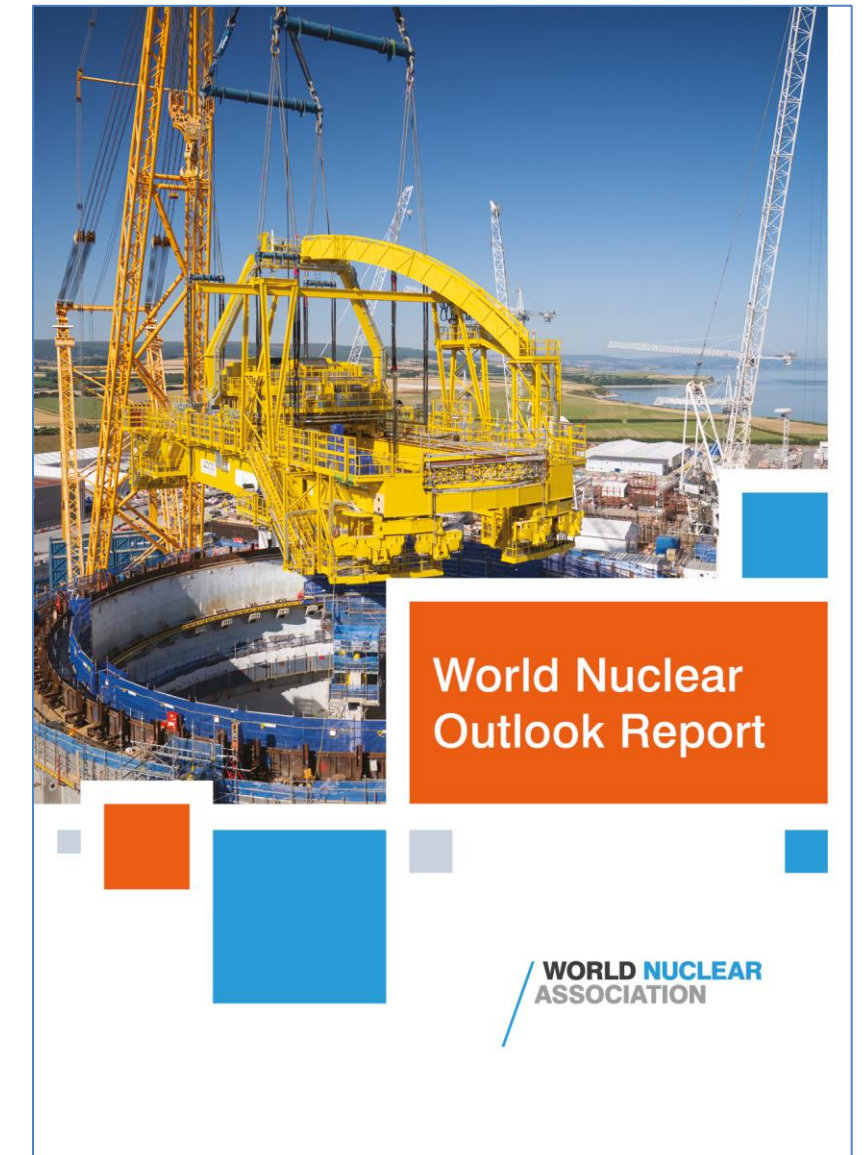
50 country performance reviews and assessments

Assessment of readiness and progress towards national targets for nuclear capacity

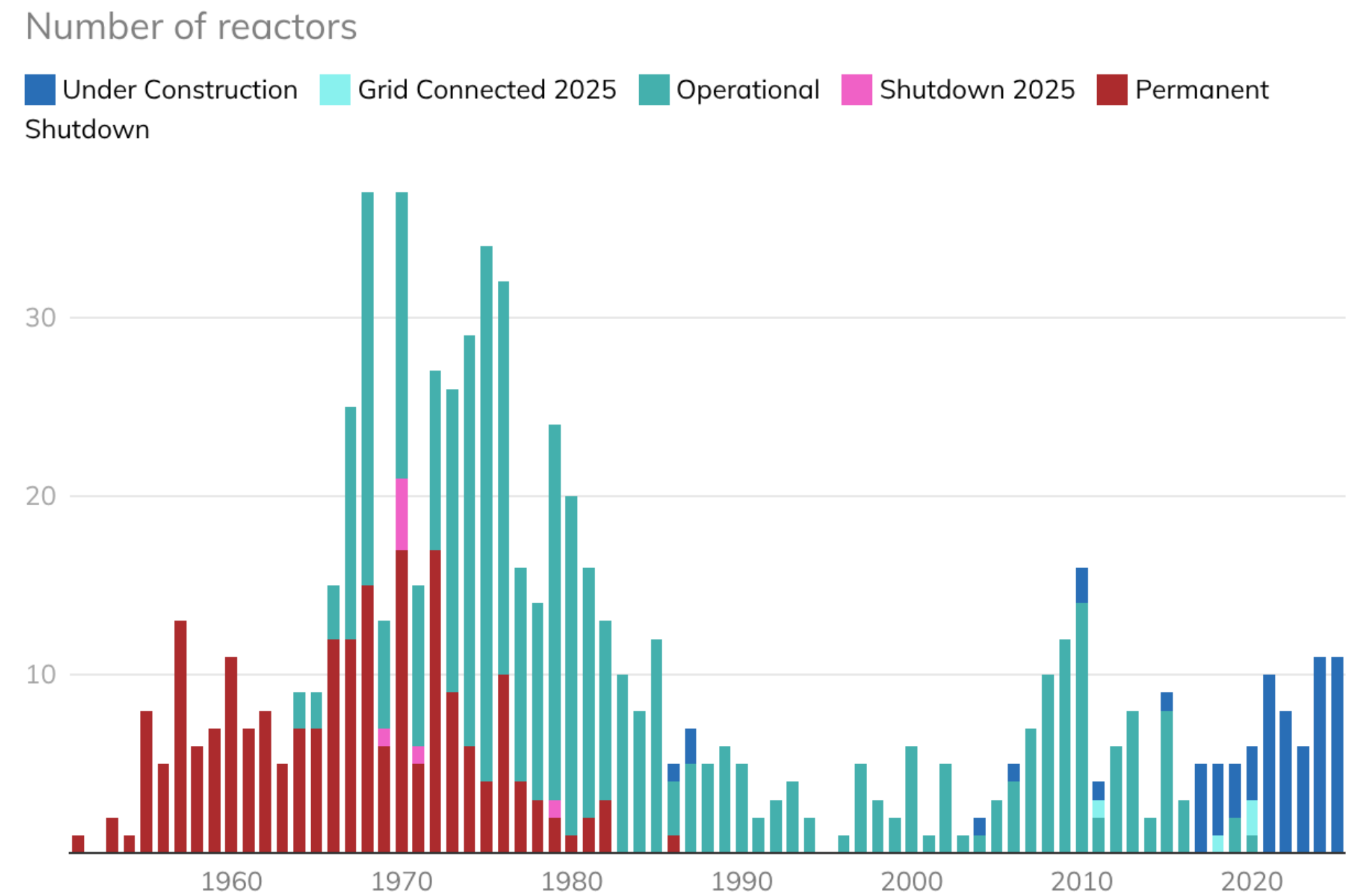
The assessment looking at the readiness of five different groupings of countries

Policy recommendations for tripling global nuclear capacity

The policy recommendations, to governments, regulators, financiers and industry.



Rate of new construction starts increasing



11

reactor construction starts

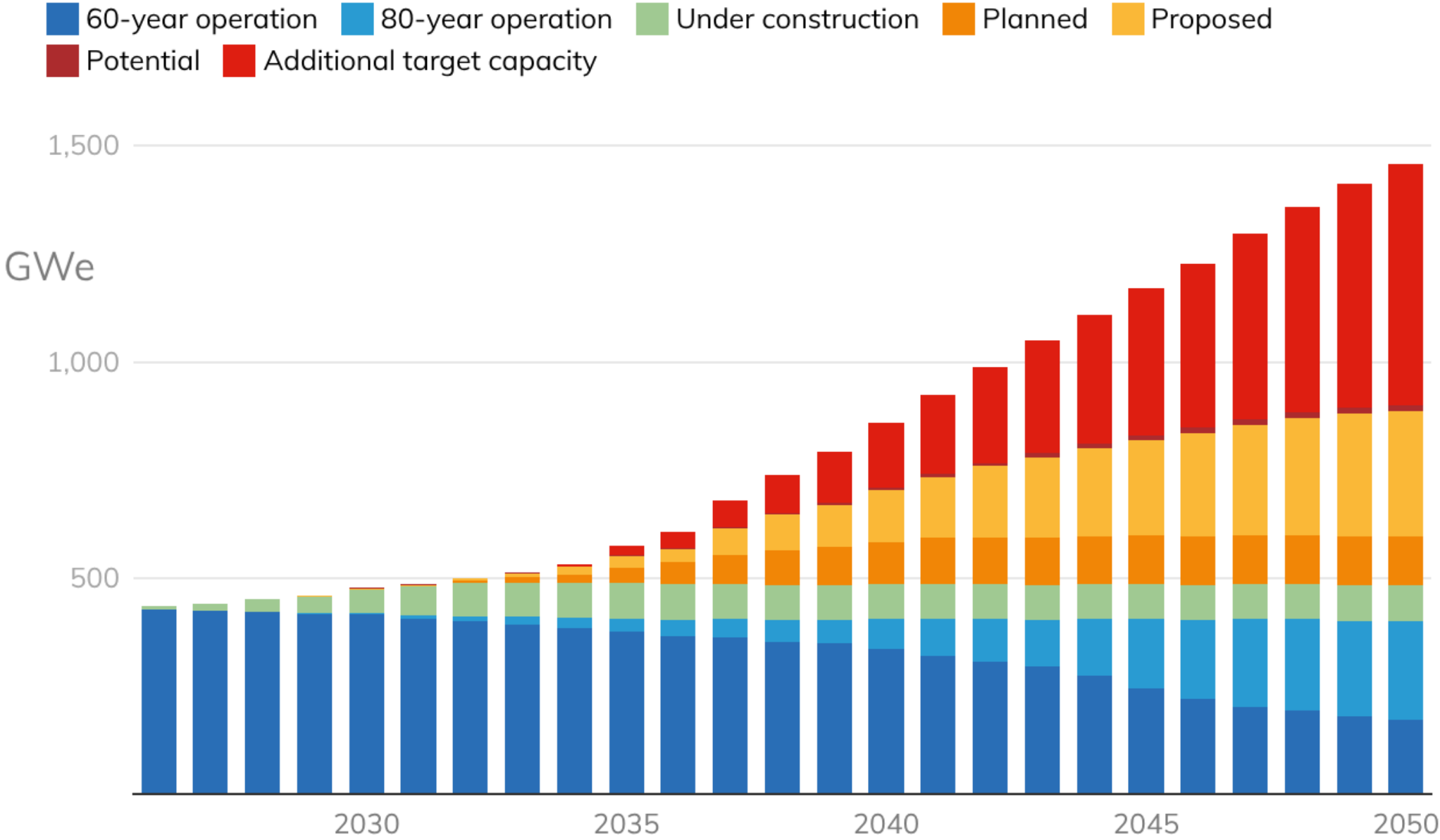
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grid connections / shutdowns

~6x

eventual increase in construction start rate required

National ambitions could reach 1,457 GWe by 2050



401 GWe

Existing reactors, with 230 GWe achieving operations beyond 60 years

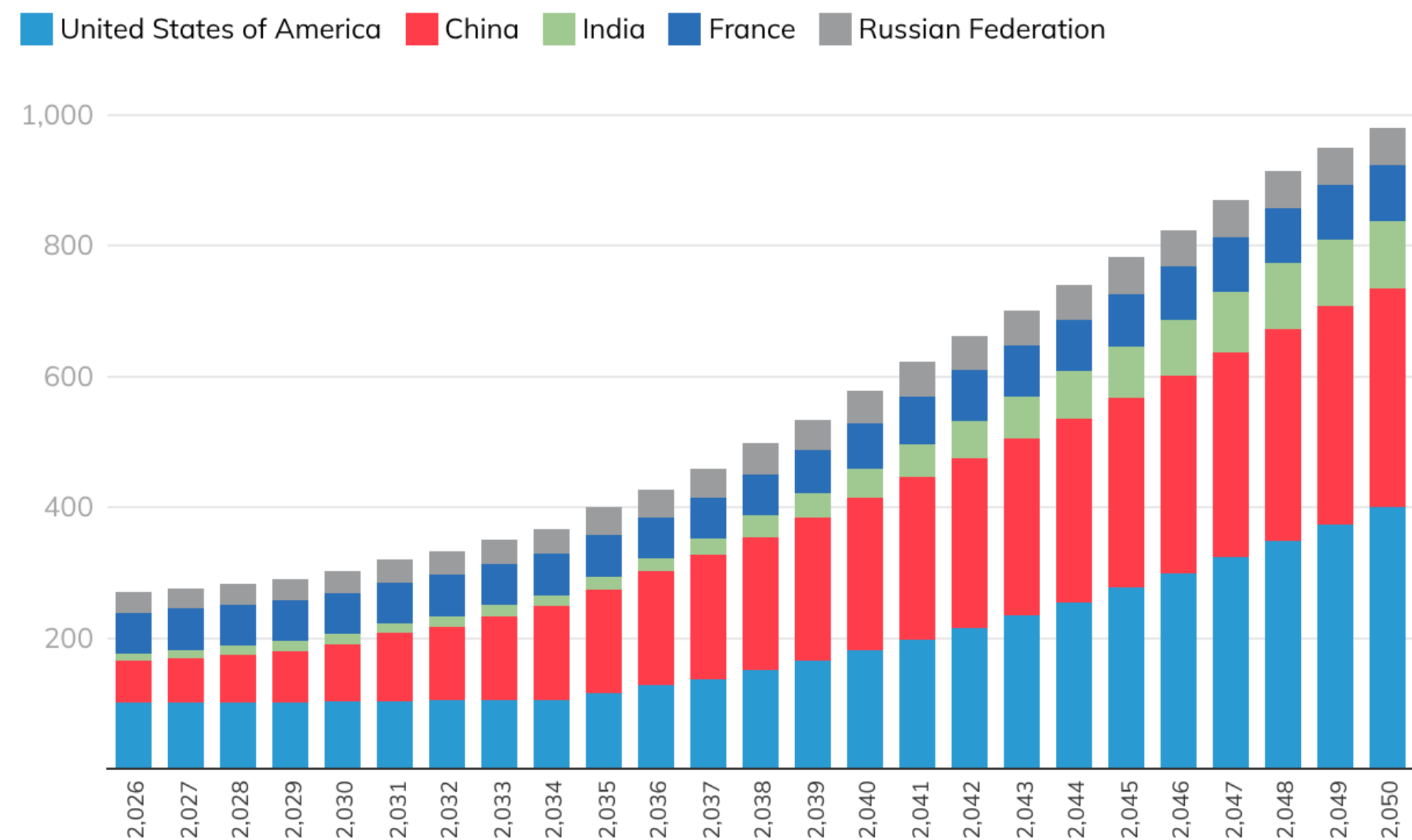
498 GWe

Under construction, planned, proposed, potential

559 GWe

Additional capacity required, beyond currently identified proposals.

Most prospective capacity in established nuclear markets



1,303 GWe

2050 capacity in countries operating reactors in 2026

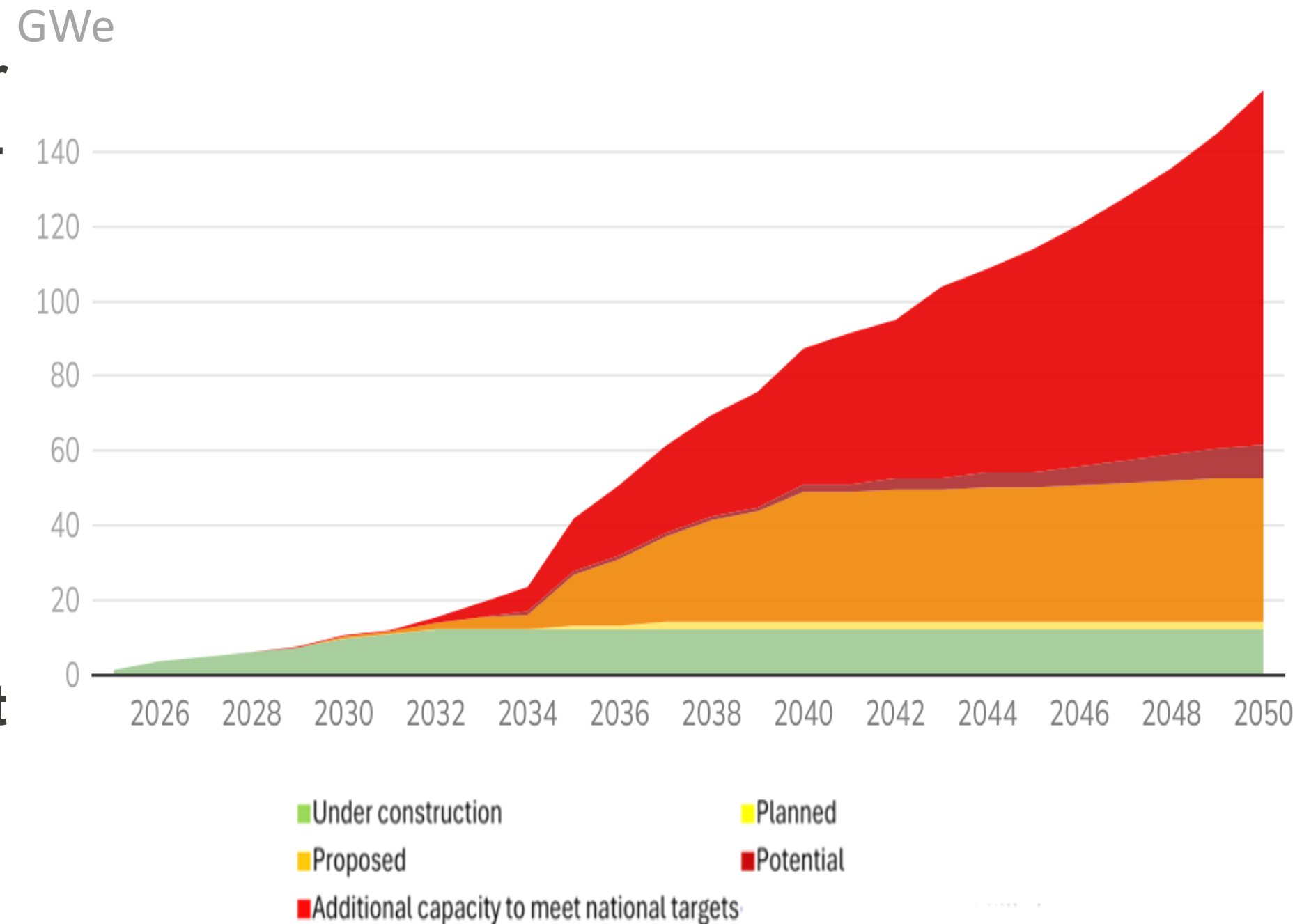
986 GWe

China, France, India, Russia and the USA account for 986 GWe—around two-thirds of the global total.

Nuclear capacity up to 2050, in countries currently without operable reactors

Newcomer nuclear nations have ambitions for nuclear capacity to reach 154 GWe by 2050, highlighting rising interest beyond traditional nuclear operators.

Many more countries are exploring the use of nuclear energy but have not yet announced nuclear development goals.



New entrant countries with nuclear targets

- Bangladesh
- Ecuador
- Egypt
- Estonia
- Ghana
- Indonesia
- Italy
- Kazakhstan
- Kenya
- Nigeria
- Philippines
- Poland
- Saudi Arabia
- Serbia
- Sri Lanka
- Thailand
- Turkey
- Uganda
- Uzbekistan
- Vietnam

Readiness spans policy, institutions, projects and targets

WORLD NUCLEAR
ASSOCIATION

Celebrating 25 Years

01

Policy Framework Readiness

Durable policy, targets,
roadmaps and investment
frameworks

02

Institutional and Infrastructure Readiness

Regulation, law,
workforce, supply chain,
fuel and waste

03

Project and Programme Readiness

Sites, technology,
licensing, finance and
construction preparation

04

Target Achievability

Scale, timing and
credibility of the delivery
pathway

The first three test delivery capability; the fourth tests whether a country can meet the national target.

Programme position shapes the delivery challenge

Pacesetters

Continuous construction programmes

Preserve serial-build capability

China, Russia, South Korea

Expanders

Active or recent build experience

Scale into repeat programmes

Canada, Czech Republic, Finland, France, Hungary, India, Iran, Pakistan, Slovakia, United Kingdom, United States

Restarters

Mature institutions; limited recent build

Rebuild project delivery

Argentina, Armenia, Belgium, Brazil, Bulgaria, Japan, Netherlands, Romania, Slovenia, South Africa, Sweden, Ukraine

Newcomers

First plant recently completed or advancing

Retain learning for follow-on projects

Bangladesh, Belarus, Egypt, Kazakhstan, Poland, Türkiye, United Arab Emirates, Uzbekistan

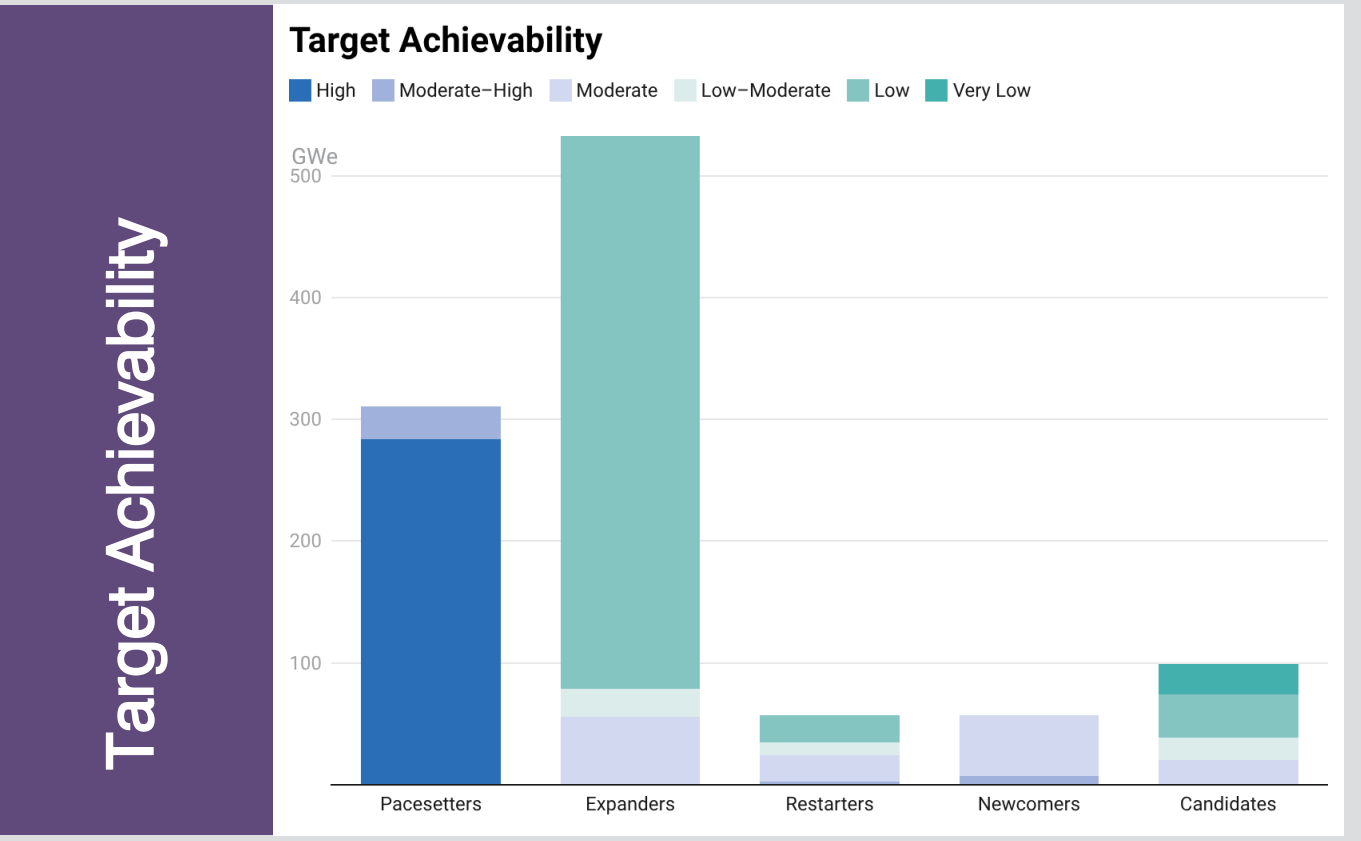
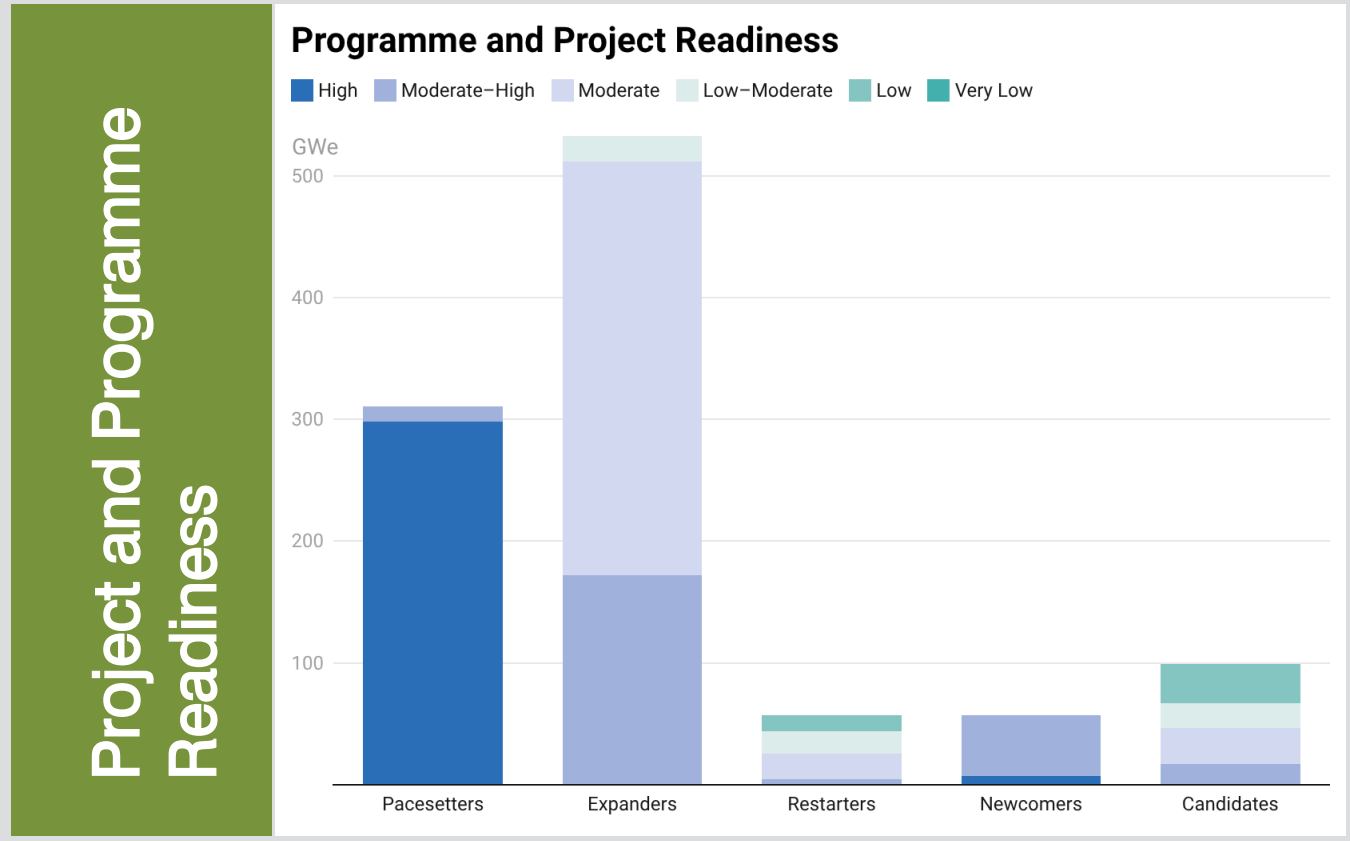
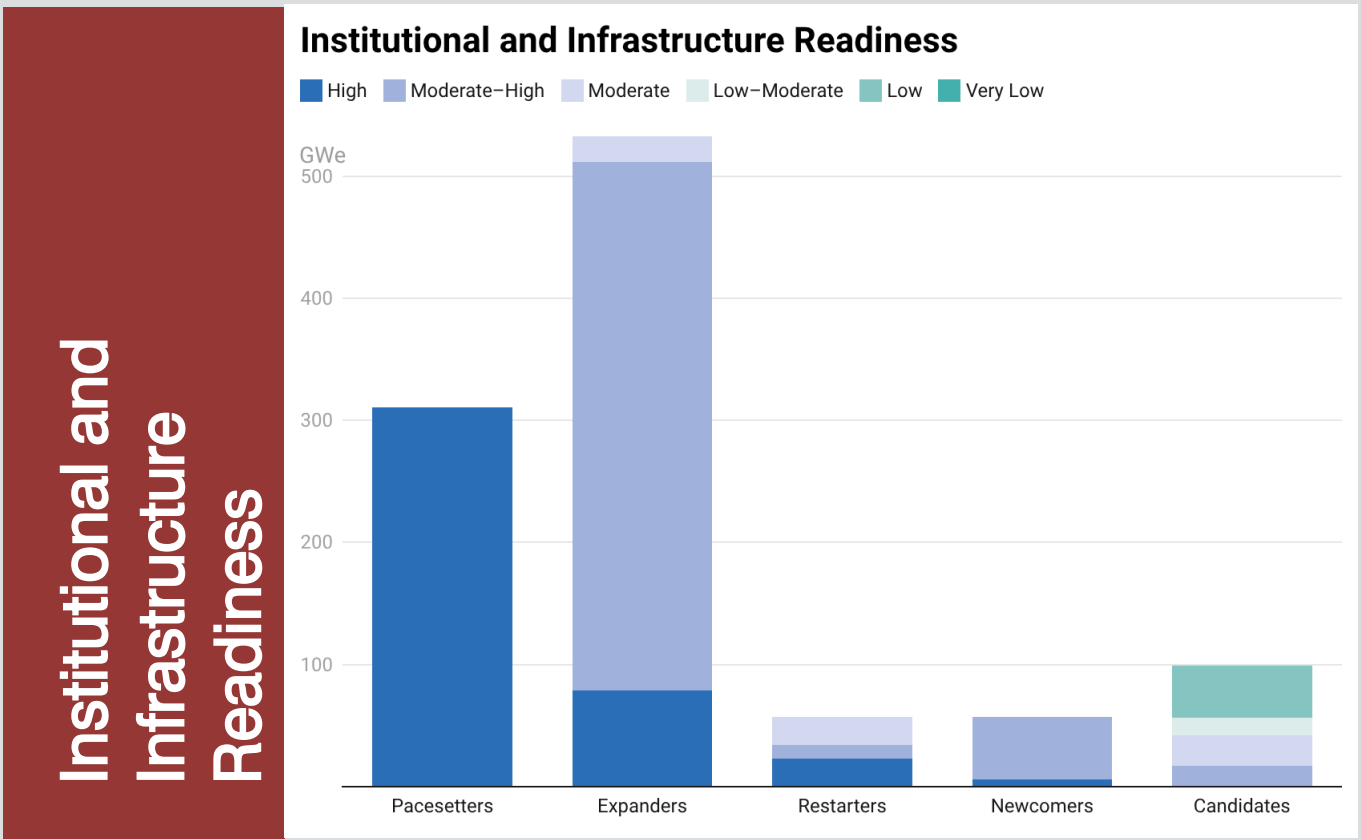
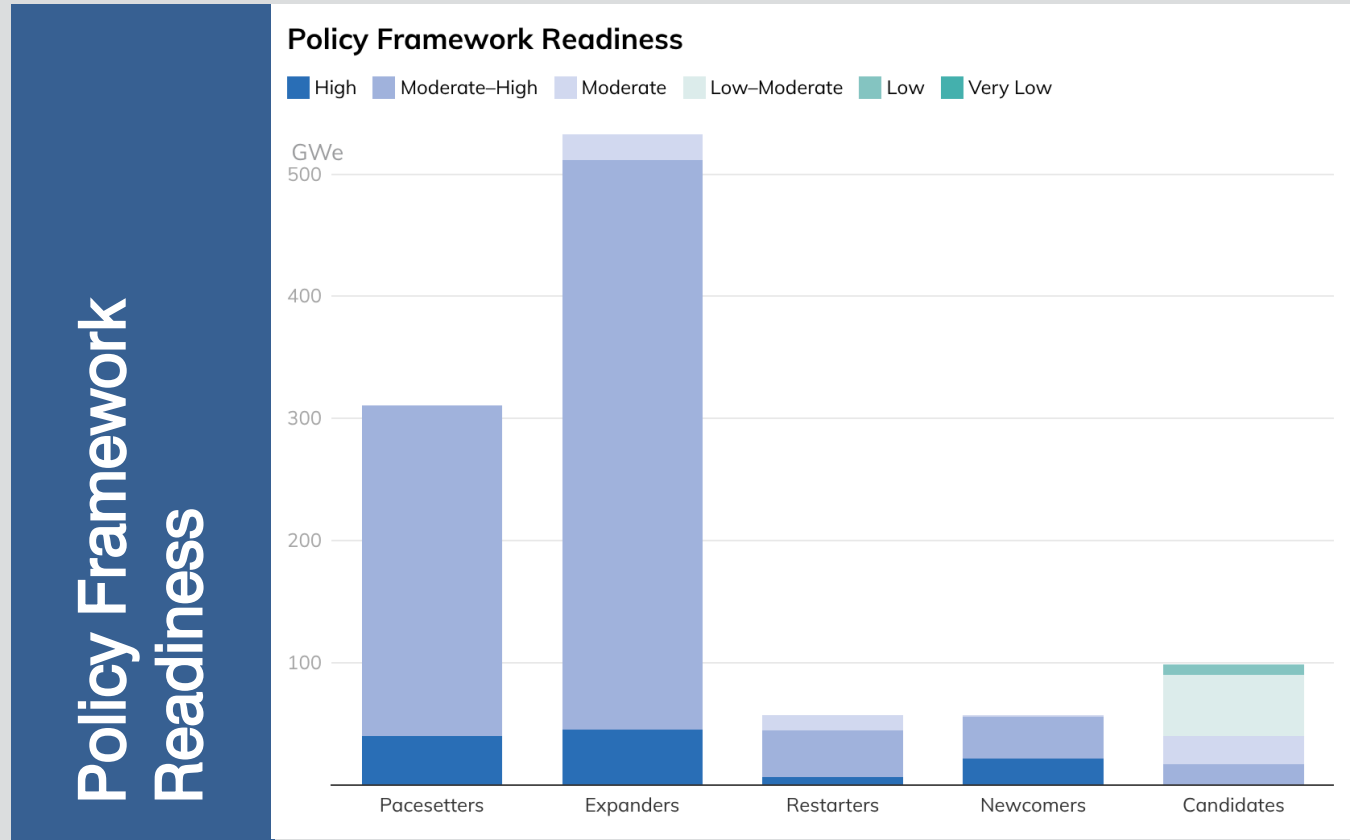
Candidates

Nuclear selected for a future role

Turn commitment into institutions, programmes and projects

Ecuador, Estonia, Ghana, Indonesia, Italy, Kenya, Nigeria, Philippines, Saudi Arabia, Serbia, Sri Lanka, Thailand, Uganda, Vietnam

Assessment of country groupings



Summary of assessments for different country groupings

Pacesetters



Strong across all four criteria

Expanders



Strong policy and institutions; project pipelines must scale

Restarters



Existing capability advantageous; need to rebuild new project delivery

Newcomers



First-project readiness is improving; target delivery remains harder

Candidates



Wide variation, with most projects still at an early stage

The central gap is conversion: targets and institutions must become financed, licensed and repeatable projects.

■ ■ World Nuclear Supply Chain Report 2026

To be published in 2026

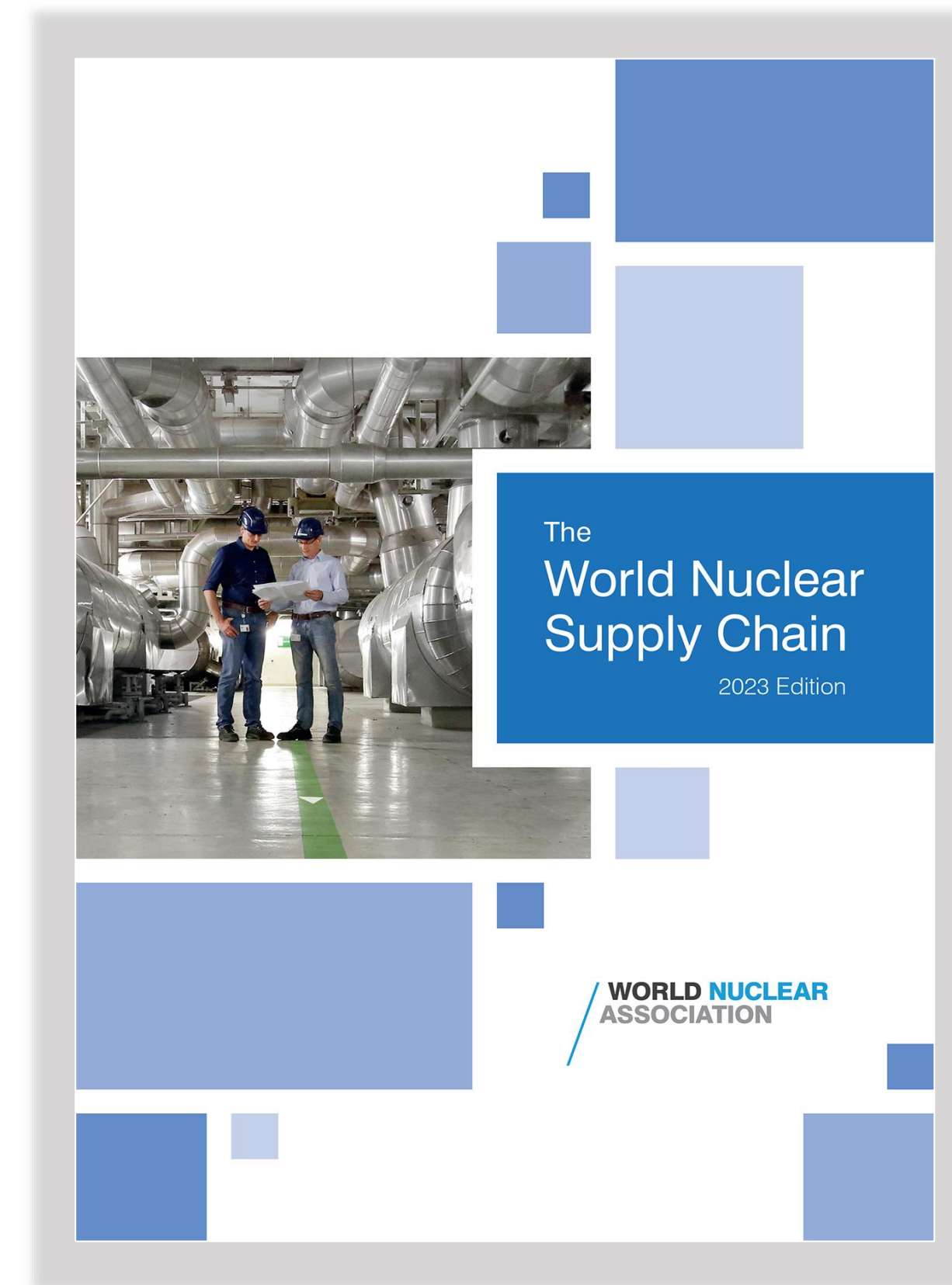
New focus on:

Nuclear project pipelines – providing details of global planned nuclear new build projects.

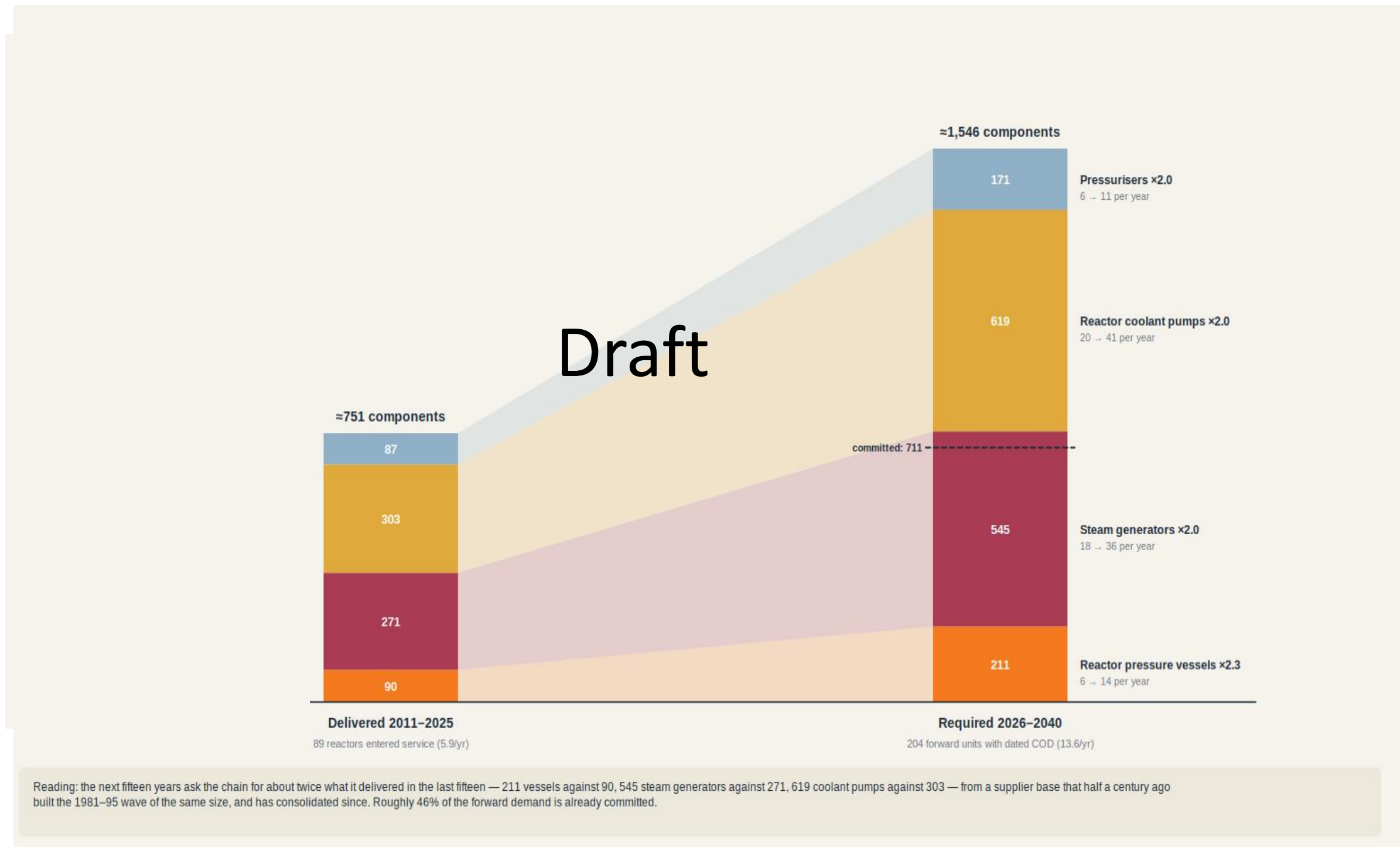
Delivering major nuclear projects and programmes – good practice on nuclear projects.

Nuclear supply chain capability analysis – initial assessment to focus on key nuclear mechanical equipment.

Procurement management – highlight supply chain requirements and entry route to nuclear market.



Global nuclear equipment demand



Global Nuclear Capability Assessment

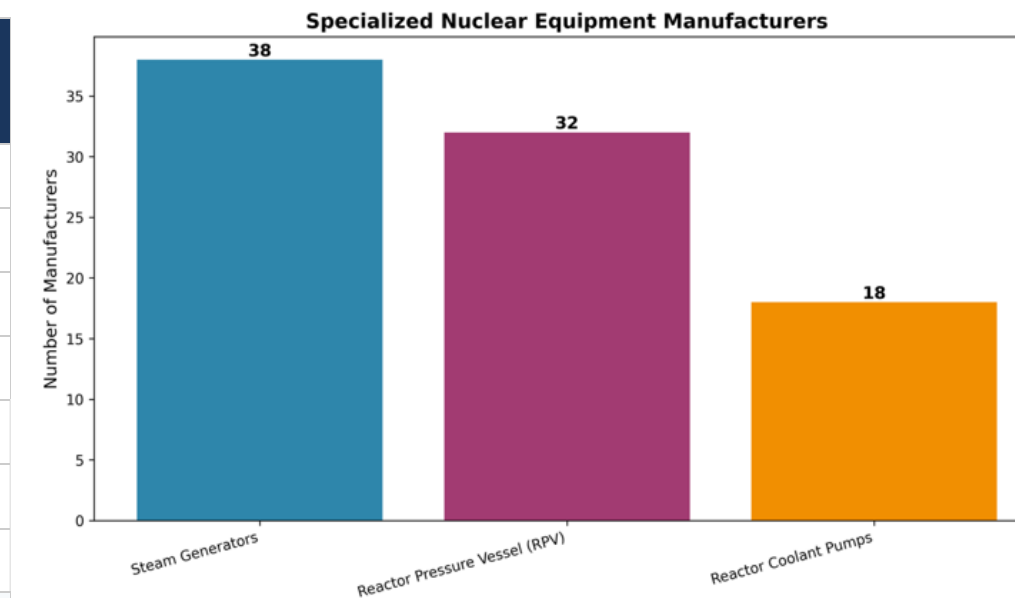
Assessment of Nuclear supply chain capability analysis – initial assessment to focus on key nuclear major mechanical equipment.

ASME Nuclear Capability - examines ASME N-stamp suppliers, to better understand the capabilities and capacity of these key equipment manufacturers.

Also assessment non-ASME list of key suppliers of major nuclear equipment from China, Czechia, Germany, India, Japan, Russia, Ukraine; approximately 160 key suppliers.

ASME N-stamp

Country	ASME N-stamp Suppliers	Share	Region
United States	47	39.2%	Americas
South Korea	17	14.2%	Asia
China	14	11.7%	Asia
Canada	9	7.5%	Americas
Germany	6	5.0%	Europe
France	5	4.2%	Europe
Japan	5	4.2%	Asia
Other (11 countries)	17	14.2%	Various



Non-ASME key nuclear suppliers

WNA component ↓	CN 87	RU 26	DE 5	UA 4	JP 3	CZ 2	IN 2
1 RPV (pressure vessel)	15	4	1	1	3	.	.
2 Reactor vessel internals	7	3	1	1	.	.	.
3 Control rod drives (C...	4	1	1	.	.	.	.
4 Steam generators	20	9	2	2	2	.	.
5 Reactor coolant pumps	12	6	2	1	.	.	.
6 Pressurizer	15	7	1	1	.	.	.
7 Primary piping	29	6	2	1	.	.	.
8 Containment iso./relie...	25	9	2	1	.	2	2

Shape the Future of the Global Nuclear Supply Chain

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With the support of the
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and the
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Helping the global nuclear industry
deliver 24/7 clean energy for all

king.lee@world-nuclear.org

www.world-nuclear.org
info@world-nuclear.org

