



Global Nuclear Fuel

A Joint Venture of GE, Toshiba, & Hitachi

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April 5, 2002

ENC 2002
Lille, France, October 9, 2002

Invited Paper - Outline Draft

Title: **“Nuclear Fuel - Globalization, Consolidation and Challenge”**
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⚡ **Customer requirements drive the industry**

- ? Global variation (Europe, North America, Asia)
 - ? Diverse demands, operational requirements
 - ? De-regulation, excess capacity/slower demand growth – driving cost competitiveness as a key
 - ? Increasing demands on fuel performance
- ? Requires diverse, flexible Fuel Products and Services solutions

⚡ **Fuel Products and Services - New requirements and challenges**

- ? Supplier Consolidation
 - ? Many former fabricators - now three strong international suppliers
- ? Fuel Technology and Performance
 - ? Strong advances: Fuel cycle costs, Margins, Reliability
- ? Design and Methods Technology
 - ? Consolidation, Automation, Globalization
 - ? New tools: Key to enhanced Fuel/Plant performance
- ? Regulatory Requirements
 - ? Plant licensing and environmental requirements stable
 - ? Transportation requirements - continuing change and inconsistency
- ? Technical Talent
 - ? Need to pro-actively develop renewed sources of talent

⚡ **Summary**