

MARKET REPORT



Offshore Wind Market by Component (Turbine, Substructure, and Electrical Infrastructure), Turbine Module, Substructure Type, Location (Shallow Water, Transitional Water, and Deep Water), and Region - Global Forecast to 2022

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“The offshore wind market is projected to grow at a CAGR of 15.32% from 2017 to 2022”

The offshore wind market is projected to reach USD 55.11 billion by 2022, at a CAGR of 15.32% from 2017 to 2022. The offshore wind market has been rapidly growing, especially in Europe as it contributed the European Union (EU) to meet its renewable energy targets for 2020. The global demand for electric power is increasing due to various factors such as urbanization, increased industrialization, and economic development among others. Rising energy demand and energy efficiency mandates drive the demand for the offshore wind market. The offshore wind market is gaining acceptance due to its high capacity factor which makes it an important renewable resource to help in the reduction of CO2 emissions. Moreover, countries like China and the U.S. are also focusing on emission reduction.

“The monopile substructure segment is expected to be the largest market from 2017 to 2022”

With regard to the substructure segment, monopiles are expected to constitute the largest market from 2017 to 2022. This type of substructure is mostly the preferred foundation type in the shallow water location. It is mostly used for its simplicity, both in terms of installation and fabrication. Monopiles have been recently upgraded to be used in greater water depths and, thus, it is expected to maintain its position and cover the largest market during the forecast period.

“The nacelle component in the turbines is expected to be the largest segment for the offshore wind market from 2017 to 2022”

The nacelle is an important part of the turbine. It accounts for the maximum cost of the turbine as it comprises all the major power generation equipment, namely, generator, gearbox, bearings, yaw system, converter, transformer, and switchgear among others. Hence, it is an integral part of the turbine and is expected to hold the largest share in the turbine component during the forecast period.

“Europe: The largest market for the offshore wind market”

The market in Europe is currently the largest market for offshore wind, followed by Asia-Pacific and North America. Growth in the region is primarily driven by the U.K., Germany, and Denmark. The U.K. is expected to dominate the offshore wind market. Rising energy efficiency mandates by the countries for meeting European Union’s (EU) renewable energy targets for 2020, would result in increasing the demand for offshore wind energy in Europe.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject matter experts, C-level executives of key market players, and industry consultants among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 67%, Tier2- 21%, Tier 3- 12%

By Designation: C-Level- 25%, D-Level- 35%, Engineer-Level- 40%

By Region: North America- 12%, Europe- 68%, Asia-Pacific- 20%

The tier of the companies has been defined on the basis of their total revenue, as of 2015: Tier 1 = > USD 10 billion, Tier 2 = From USD 1 billion to USD 10 billion, and Tier 3 = < USD 1 billion

Source: Industry Experts and MarketsandMarkets Analysis

Research Coverage:

From an insight perspective, this research report has focused on various levels of analysis, such as, industry analysis (industry trends), market ranking of top players, supply chain analysis, and company profiles, which together comprises and discuss the basic views on the competitive landscape; emerging and high-growth segments of the offshore wind market; high-growth regions; and market drivers, restraints, and opportunities.

The report provides insights on the following pointers:

- **Market Penetration:** Comprehensive information on products and integrated solutions and services offered by top players in the global offshore wind market
- **Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product launches in the offshore wind market
- **Market Development:** Comprehensive information about lucrative emerging markets- the report analyzes the markets for offshore wind across regions
- **Market Diversification:** Exhaustive information about new products, untapped regions, recent developments, and investments in the global offshore wind market
- **Competitive Assessment:** In depth vendor dive analysis of all the key players, strategies, products, and manufacturing capabilities of the leading players in the global offshore wind market

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