

Global Shore Power by Installation, Component and Connection Market Analysis and Forecast 2024-2034

<https://marketpublishers.com/r/G9CDF1255A57EN.html>

Date: October 2024

Pages: 215

Price: US\$ 5,445.00 (Single User License)

ID: G9CDF1255A57EN

Abstracts

Summary

While docked at port, ships require power to maintain their lights, heating, cooling, and other essential vessel functions. Typically, this power is provided by running the ship's diesel-fueled auxiliary engines. Shore power, also known as cold-ironing onshore power supply (OPS) or alternative marine power, provides electrical power from the shore to a ship. At the same time, it's docked, thereby allowing a ship's auxiliary engines to be turned off and the burning of diesel fuel to cease. Therefore, shore power is an effective way of reducing air emissions and improving local air quality. Additionally, by providing ship operators with an alternative to running diesel auxiliary engines while docked, shore power technology also reduces ship owners' fuel costs, increasing ports' competitiveness.

The core technologies of shore power systems include power transmission and frequency conversion. Because electricity standards vary from country to country (e.g., 60 Hz in North America versus 50 Hz in most European and Asian countries), shore power systems typically require frequency converters to convert the port's electrical frequency to a frequency suitable for use by ships. In addition, shore power systems require high power transmission capability, stable voltage regulation, and safe and reliable cable connections.

A shore power system is typically made of 3 main subsystems:

1. Electrical substation
2. Interface system

3. Ship's electrical equipment on board.

The Electrical substation converts the electricity from the grid, or from a local dedicated generator using clean or low carbon fuel, into the right voltage and frequency for the vessels. These systems require electrical protection devices, transformers, frequency converters, power meters and safety control systems.

The Interface or cable management system is a system typically installed on shore (containerized or dock mounted, sometimes barge-mounted), or on ship, that stores, deploys and recovers safely the cables and connectors necessary for the shore power connection. The Cable Management System (CMS) cables then plug in to a receptacle with sockets or inlets.

Ship's Electrical Equipment is the additional electrical equipment (switchboard, control systems, transformers, power monitoring and control systems) that a ship needs to install in the engine room and near the connection point on deck to receive shore power. This equipment can be easily fitted in the hull for a new building, however, to retrofit existing vessels, one often needs to find extra space.

How does Shore Side work:

The power grid (8kV, 50Hz) feeds the power conversion system, such as an e-house or container in the port.

In this e-house or container, electrical power is converted to the IEC standard, which is 60hz and, for most vessels, 6.6kV or Direct Current for a battery charging Vessel Type. The power conversion system includes a converter, transformer, cooling, and firefighting system.

The cable handling system then allows the heavy cables to be lifted to the ship. On the ship, an incoming panel is placed in a confined room, where the operator connects the ship to shore power.

The power is often supplied via a transformer (if the ship grid is low voltage) connected to the main switchboard.

Worldwide there are approximately 4,500 commercial vessels with a gross tonnage greater than 5,000 tons that are currently equipped for shore power. Analysis of the

global fleet by APO that approximately 15% of container vessels are shore power equipped along with around 27% of cruise ships. This number continues to increase and can vary significantly by vessel type and region.

With California and China ports requiring the use of shore power, many shore power-ready vessels are currently operating in the Pacific. APO Analysis of public vessel connection data for cruise ships calling on the ports of Juneau and Los Angeles, which are both shore power equipped, shows that nearly one quarter (77 out of 323) of the global shore power equipped cruise ships visit these two ports. Similarly, vessel connection data for container ships calling on the ports of Los Angeles and Oakland indicate that around 15.2 % (819 out of 5,371) of the global shore power equipped container ships visit these two ports. These counts do not represent a complete inventory of all vessels equipped with shore power, but instead provide a lower bound value for cruise and container ship shore power readiness.

In China, shore power is available at all container terminal berths at the Port of Shenzhen, which offers subsidies for construction of shore power berths (30%), fully subsidizing demand charges, and fully subsidizing electricity prices to align with the rate demanded by the government which also factors in the price of oil. The Port of Shanghai has entered an 'EcoPartnership' with the Port of Los Angeles to facilitate sharing shore power information and have created a Green Shipping Corridor between the two ports. China has mandated that China-flagged public service vessels, inland river vessels, and river-sea vessels built on or after January 1, 2019, be equipped with a shore power system. China also mandated that additional China-flagged vessels built on or after January 1, 2020, including coastal container ships, cruise ships and ferries, passenger ships over 3,000 metric tons, and dry bulk carriers over 50,000 metric tons be equipped with shore power systems.

It should also be noted that shore power Vessel Types are expanding in Europe. EU regulation 2014/94/EU requires European ports to provide shore power by 2025. As more European ports offer shore power, there are likely to be more shore power-ready vessels in the Atlantic. At present, shore power has not been extensively adopted globally. However, the International Maritime Organization (IMO), transportation and environment advocacy groups, and port certification groups have been encouraging ports throughout the world to adopt shore power systems. Five major European ports (Antwerp, Bremerhaven, Hamburg, Haropa, and Rotterdam) have also signed a memorandum of understanding to jointly commit to the maximum deployment of onshore power supply facilities for ultra-large container ships by 2028. The Port of Hamburg, Germany, has been introducing land-based power supply facilities for cruise

ships since 2017, leading to an increase in the port's attractiveness. A list of 68 shore power-equipped ports around the world has been compiled by APO.

According to APO Research, the global market for Shore Power was estimated to be worth US\$ XX million in 2023 and is forecasted to reach US\$ XX million by 2034, with a CAGR of XX% during the forecast period 2024-2034. The North American market for Shore Power is valued at US\$ million in 2023 and will reach US\$ million by 2034, growing at a CAGR of % during the forecast period. The Asia-Pacific market for Shore Power was valued at US\$ million in 2023 and will reach US\$ million by 2034 at a CAGR of %. Similarly, the European market was valued at US\$ million in 2023 and projected to reach US\$ million by 2034, growing at a CAGR of %.

This report analyzes the segments data by Type and by Vessel Type, sales, revenue, and price, from 2019 to 2034. Evaluation and forecast the market size for Shore Power sales, projected growth trends, production technology, Vessel Type and end-user industry.

Shore Power segment by Company

ABB

Cavotec

W?rtsil?

Siemens

Nidec ASI

Schneider Electric

Watts Marine

Eaton

NARI Technology

Xuji Group

GE Vernova

Marinco

Hubbell

Atlas Marine Systems

Tratos Group

Magnus Marine

ANG Power Systems

Shore Power segment By Installation

Shoreside

Shipside

Shore Power segment By Component

Transformer

Switchgear

Frequency Converter

Cables & Accessories

Others

Shore Power segment By Connection

New installation

Retrofit

Shore Power segment by Vessel Type

Container

Reefer

Cruise

RORO

Tanker

Special Vessels

Shore Power segment by Region

North America

Europe

Asia-Pacific

Study Objectives

1. To analyze and research the global status and future forecast, involving, production, value, consumption, growth rate (CAGR), market share, historical and forecast.
2. To present the key manufacturers, capacity, production, revenue, market share, and Recent Developments.
3. To split the breakdown data by regions, type, manufacturers, and Vessel Type.
4. To analyze the global and key regions market potential and advantage, opportunity and challenge, restraints, and risks.

5. To identify significant trends, drivers, influence factors in global and regions.
6. To analyze competitive developments such as expansions, agreements, new product launches, and acquisitions in the market.

Reasons to Buy This Report

1. This report will help the readers to understand the competition within the industries and strategies for the competitive environment to enhance the potential profit. The report also focuses on the competitive landscape of the global Shore Power market, and introduces in detail the market share, industry ranking, competitor ecosystem, market performance, new product development, operation situation, expansion, and acquisition. etc. of the main players, which helps the readers to identify the main competitors and deeply understand the competition pattern of the market.
2. This report will help stakeholders to understand the global industry status and trends of Shore Power and provides them with information on key market drivers, restraints, challenges, and opportunities.
3. This report will help stakeholders to understand competitors better and gain more insights to strengthen their position in their businesses. The competitive landscape section includes the market share and rank (in volume and value), competitor ecosystem, new product development, expansion, and acquisition.
4. This report stays updated with novel technology integration, features, and the latest developments in the market.
5. This report helps stakeholders to gain insights into which regions to target globally.
6. This report helps stakeholders to gain insights into the end-user perception concerning the adoption of Shore Power.
7. This report helps stakeholders to identify some of the key players in the market and understand their valuable contribution.

Chapter Outline

Chapter 1: This chapter introduces the concept of shore power and provides a broad

overview of the global market. It explores the segmentation by installation type (shore-side and ship-side), key components such as transformers and cables, and different connection types (new installations versus retrofits). The chapter also categorizes vessels that use shore power, including container ships, cruise liners, and specialized vessels.

Chapter 2: Introduces the market dynamics, latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 3: This chapter focuses on growth projections for the shore power market, detailing revenue and sales estimates for the period from 2019 to 2034. It provides a regional breakdown of revenue and market share, forecasting growth in North America, Europe, Asia-Pacific, and other regions.

Chapter 4: This chapter analyzes the competitive landscape of the shore power industry. It ranks manufacturers by revenue and sales, explores their production capacity, and identifies key players in the market. The section also provides detailed information on top global and regional manufacturers, examining their strategic positions in the market.

Chapter 5: This section provides a detailed analysis of shore power installation types, breaking down market revenue and sales into shoreside and shipside installations. It projects future growth by installation type and examines the cost distribution and challenges associated with each.

Chapter 6: This chapter segments the shore power market by the main components used in the systems. It evaluates the market share and sales of transformers, switchgear, frequency converters, and cables. The chapter also forecasts the demand for these components and explores trends in the adoption of various technologies in different regions.

Chapter 7: This section examines market trends based on connection type—new installations and retrofits. It analyzes the proportion of revenue and sales generated by each connection type, considering factors like infrastructure age, cost, and technology compatibility.

Chapter 8: This chapter looks at market demand segmented by different vessel types, including container ships, reefer vessels, cruise ships, Ro/Ro vessels, and tankers. It

analyzes the adoption of shore power across each category and forecasts growth based on vessel usage patterns and regulatory requirements.

Chapter 9: This section presents in-depth profiles of the leading manufacturers in the shore power market, including companies such as ABB, Cavotec, Wartsila, Siemens, Nidec ASI, and Schneider Electric. Each profile includes an overview of the company's business operations, product portfolios, recent developments, and their positioning within the shore power industry.

Chapter 10-12: North America, Europe, Asia-Pacific by Installation, by Component, by Connection and by Vessel Type, sales, and revenue for each segment.

Chapter 13: Analysis of industrial chain, sales channel, key raw materials, distributors and customers.

Chapter 14: The main concluding insights of the report.

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