

Global Marine Parallel Hybrid Propulsion Market Size study & Forecast, by Ship Type (Tugs & Barge, Offshore Vessel, Fishing Vessel, Research and Survey Vessel, Search and Rescue Vessel, Patrol Boats, Passenger Ship, Recreational Boats, Landing Crafts), By Engine Power Rating (Upto 150 HP, 150 to 500 HP, 500 HP to 1,000 HP, 1,000 HP to 3,000 HP), By Component (IC Engine, Generator, Power Management System, Battery, Gearbox, Others), By Instalment (Line Fit and Retro Fit), Motor Capacity (Upto 50 KW, 50 KW to 200 KW, 200 KW to 400 KW) and Regional Forecast, 2023-2030

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Abstracts

Global Marine Parallel Hybrid Propulsion Market is valued approximately at USD 0.90 billion in 2022 and is anticipated to grow with a growth rate of more than 11.9% over the forecast period 2023-2030. Marine Parallel Hybrid Propulsion is a propulsion system utilized in marine vessels that integrates both traditional internal combustion engines and electric propulsion systems in a parallel configuration. In this setup, both the conventional engine and electric motor are connected to the vessel's propeller shaft, allowing them to work in tandem or independently depending on the operational requirements. The parallel hybrid design offers greater flexibility and efficiency, enabling vessels to optimize their power sources based on factors such as speed, load and environmental considerations. The Marine Parallel Hybrid Propulsion market is expanding because of factors such as rising focus on fuel efficiency and operational

cost savings, increasingly stringent environmental regulations and a government incentives and funding,

The primary concern for ship owners revolves around fuel consumption in diesel engine propulsion systems. Factors such as volatile fossil fuel prices, heightened sulfur emissions, and a reliance on low-grade fuel have prompted major industry players to prioritize the development of hybrid propulsion systems. According to various marine journals, hybrid propulsion systems can effectively reduce NOx emissions by up to 40% through maximum load reduction. A report from the International Council on Clean Transportation (ICCT) suggests that the installation of a hybrid propulsion system on a container ship has the potential to cut fuel consumption by 10-20%. Another study supports these findings, indicating that hybrid propulsion systems could achieve fuel savings of up to 30% compared to traditional propulsion systems. These compelling statistics underscore the pivotal role of hybrid propulsion systems in curbing fuel consumption, thereby resulting in lower operating costs for maritime operators, resulting in market growth. In addition, increased shipbuilding and retrofitting activities and ongoing advancements in hybrid propulsion technology are creating new opportunities to the market growth. However, high initial costs and increase in complexity of propulsion system compared to conventional system stifles market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Marine Parallel Hybrid Propulsion Market study includes Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 with largest market share. The regional market expansion can be attributed to the growing size of the marine fleet. Moreover, the market is being positively influenced by the heightened emphasis of various Original Equipment Manufacturers (OEMs) on research and development, along with the implementation of hybrid propulsion systems. In April 2022, the Canadian federal and provincial governments announced a significant injection of USD 3 million towards the adaptation of efficient hybrid and electric engines tailored for fishing vessels. This investment seeks to alleviate the initial financial burden for fishermen keen on incorporating hybrid systems, thereby streamlining the integration of hybrid fishing vessel systems. Notable beneficiaries include companies such as AKA Group and others operating within the hybrid propulsion market. Asia Pacific is expected to grow at a fastest rate during the forecast period, owing to upsurge in international trade, complemented by a rise in shipbuilding activities across countries like China, India, Japan, and others.

Major market player included in this report are:

ABB Ltd.

Rolls-Royce Holdings plc

Caterpillar Inc.

General Electric Company

Nidec Industrial Solutions

MAN Energy Solutions

Siemens AG

Mitsubishi Heavy Industries, Ltd

Wärtsilä Oyj Abp

Cummins Inc.

Recent Developments in the Market:

In March 2023, Cummins Inc. and Leclanché S.A. announced the execution of a Memorandum of Understanding (MOU). Under this agreement, a comprehensive array of hybrid, battery-only, or fuel cell package solutions will be made accessible to customers in maritime applications. Leveraging various energy sources such as engines, hydrogen fuel cells, battery packs, and ancillary components, this collaboration between Leclanché and Cummins aims to provide versatile solutions to the industry.

In October 2022, ABB and Incat Tasmania entered into a partnership to develop an electric ship featuring hybrid propulsion technology. This innovative design allows for seamless adaptation to battery energy utilization, facilitated by shore charging infrastructure availability. Through this collaboration, ABB endeavors to introduce a groundbreaking zero-emissions propulsion system and power solutions. Additionally, the agreement includes plans for the assessment of procuring 148-meter ferries and similar vessels in the future

Global Marine Parallel Hybrid Propulsion Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered – Ship Type, Engine Power Rating, Component, Installment, Motor Capacity, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Ship Type:

Tugs & Barge

Offshore Vessel

Fishing Vessel

Research and Survey Vessel

Search and Rescue Vessel

Patrol Boats

Passenger Ship

Recreational Boats

Landing Crafts

By Engine Power Rating:

Upto 150 HP

150 to 500 HP

500 HP to 1,000 HP

1,000 HP to 3,000 HP

By Component:

IC Engine

Generator

Power Management System

Battery

Gearbox

Others

By Installment:

Line Fit

Retro Fit

By Motor Capacity:

Upto 50 KW

50 KW to 200 KW

200 KW to 400 KW

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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