

# Global Subsea Pumped Storage Hydropower Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Subsea Pumped Storage Hydropower market size was valued at US\$ 226 million in 2025 and is forecast to a readjusted size of US\$ 671 million by 2032 with a CAGR of 16.7% during review period.

Subsea Pumped Storage Hydropower (SPSH) is an offshore energy storage technology that stores electricity by pumping seawater out of a submerged, sealed reservoir placed on the seabed and later releasing it back through turbines to generate power. During periods of excess electricity supply (such as high wind or solar output), pumps use grid power to evacuate water from the underwater chamber, creating a pressure differential relative to the surrounding ocean. When electricity demand rises, seawater flows back into the reservoir under hydrostatic pressure, spinning a turbine-generator to produce electricity. Unlike conventional pumped storage hydropower, SPSH does not require mountainous terrain or freshwater reservoirs, as it leverages ocean depth to provide the hydraulic head, making it particularly suitable for coastal regions with deep continental shelves and strong offshore renewable energy integration needs.

Subsea Pumped Storage Hydropower (SPSH) is emerging as a niche but strategically important segment within the long-duration energy storage (LDES) market, driven by accelerating offshore wind deployment, grid congestion in coastal regions, and the need for 8?24+ hour storage solutions with long asset lifetimes. Current activity is concentrated in pilot and demonstration projects such as Fraunhofer IEE's StEnSea concept and commercialization efforts by Sperra, while concepts like Ocean Grazer highlight growing European interest. The trend reflects three structural forces: (1) offshore wind scale-up in the North Sea, U.S. East/West Coasts, and East Asia; (2)

rising curtailment and negative pricing events in high-renewable grids; and (3) policy support for non-lithium, infrastructure-scale storage with 40-60 year lifetimes. Technologically, focus is shifting toward modular concrete sphere or seabed reservoir systems paired with high-efficiency submersible pump-turbines, while cost trajectories depend heavily on marine civil engineering optimization and depth-dependent energy density. Although still pre-commercial and at low TRL compared with conventional pumped storage, SPSH is increasingly positioned as a coastal complement to onshore PSH and hydrogen-based storage in decarbonized power systems.

This report is a detailed and comprehensive analysis for global Subsea Pumped Storage Hydropower market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

### **Key Features:**

Global Subsea Pumped Storage Hydropower market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Subsea Pumped Storage Hydropower market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Subsea Pumped Storage Hydropower market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Subsea Pumped Storage Hydropower market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

### **The Primary Objectives in This Report Are:**

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Subsea Pumped Storage Hydropower

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Subsea Pumped Storage Hydropower market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Sperra, Fraunhofer IEE, GE Hydro, Andritz Hydro, Voith Hydro, Pleuger, HOCHTIEF, Ocean Grazer, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

## **Market Segmentation**

Subsea Pumped Storage Hydropower market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

### Market segment by Type

Hydrostatic Pressure Drive

Composite Energy Storage

Others

### Market segment by Class

Shallow Water Systems (800 m)

### Market segment by Group

## Small-Scale Modular Units (300 MW)

### Market segment by Application

Renewable Energy Integration

Power Supply

Deep-sea Energy Development

Others

### Major players covered

Sperra

??Fraunhofer IEE

??GE Hydro

Andritz Hydro

Voith Hydro

Pleuger

HOCHTIEF

Ocean Grazer

### Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

**The content of the study subjects, includes a total of 15 chapters:**

Chapter 1, to describe Subsea Pumped Storage Hydropower product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Subsea Pumped Storage Hydropower, with price, sales quantity, revenue, and global market share of Subsea Pumped Storage Hydropower from 2021 to 2026.

Chapter 3, the Subsea Pumped Storage Hydropower competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Subsea Pumped Storage Hydropower breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Subsea Pumped Storage Hydropower market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Subsea Pumped Storage Hydropower.

Chapter 14 and 15, to describe Subsea Pumped Storage Hydropower sales channel, distributors, customers, research findings and conclusion.

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