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# Global Tidal Stream Turbine 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 Tidal Stream Turbine market size was valued at US$ 59.88 million in 2025 and is forecast to a readjusted size of US$ 171 million by 2032 with a CAGR of 13.9% during review period.

A tidal stream turbine is marine renewable energy equipment that captures the kinetic energy of predictable tidal currents, converts it into mechanical rotation through underwater rotors and blades, and generates electricity through an integrated generator, power conversion and control system. The main product forms include seabed-mounted turbines, floating tidal turbines, tidal kite devices and multi-unit tidal arrays. Typical systems integrate rotors, hubs, shafts, bearings, subsea seals, generators, converters, monitoring equipment, foundations or floating platforms, mooring structures and subsea power interfaces. Rated power generally ranges from approximately 100 kW to 3 MW. Smaller units are primarily used for resource testing, research, island microgrids and offshore facilities, while megawatt-scale units are designed for grid-connected generation and commercial arrays in straits, tidal channels and high-energy coastal waters. The research scope focuses on complete tidal stream turbine units and directly integrated turbine systems supplied by manufacturers for grid-connected power generation, island and remote-area electricity supply, offshore infrastructure and demonstration projects.

## Key Findings

In 2025, the global average price of complete tidal stream turbine units was approximately US$3 million to US$8 million per unit.

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The industry average gross margin remained at approximately 25% to 40%.

Horizontal-axis turbines remained the mainstream product configuration.

Grid-connected power generation remained the largest downstream application.

Europe maintained its leading position in technology development and commercial deployment.

## Market Trends

Product development is moving toward higher unit capacity, modular arrays, improved offshore accessibility and lower lifecycle maintenance requirements. Floating platforms allow major components to be raised or accessed near the surface, while seabed-mounted systems continue to emphasize structural simplicity, survivability and low visual impact. Tidal kite and cross-flow technologies are expanding the addressable resource base by targeting lower-flow or deeper-water sites. Digital condition monitoring, standardized powertrains, advanced composite blades and modular replacement strategies are becoming increasingly important as manufacturers prepare second- and third-generation machines for pre-commercial farms. Operational experience from multi-megawatt floating turbines, grid-connected tidal kites and long-running seabed arrays is shifting competition from basic technical feasibility toward availability, maintainability and repeatable energy yield.

## Market Dynamics

The market is shaped by a strong interaction between public revenue support, grant funding, private capital and project execution capability. Long-term contracts and dedicated tidal allocations improve bankability and provide manufacturers with forward production visibility, but revenue recognition remains uneven because equipment engineering, procurement, assembly, marine installation and commissioning often extend across several years. The sector therefore experiences periods of rapid order growth followed by delivery delays caused by financing, consenting, vessel availability or grid connection schedules. Government support is gradually shifting from isolated prototypes toward pre-commercial arrays, industrial supply chains and cost reduction, which strengthens the medium-term market while maintaining high project-level volatility.

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## Drivers

Predictability is the principal structural advantage of tidal stream power. Tidal cycles can be forecast well in advance, allowing system operators to plan generation and complement variable wind and solar resources. Demand is also supported by the need for locally generated renewable electricity in islands, remote coastal communities and offshore facilities where imported fuels or long-distance grid connections are expensive. Policy support for energy security, decarbonization and marine industrial development is improving the investment environment, while accumulated operating data from existing projects is reducing technical uncertainty. The continued development of multi-unit arrays and hybrid microgrids creates additional demand for turbine equipment, storage, power conversion and control systems.

## Restraints

High capital intensity remains the main restraint. The industry has not yet achieved sufficient production volume to benefit fully from standardized manufacturing, serial procurement and mature installation logistics. Each project requires detailed resource assessment, site-specific foundations or moorings, environmental evaluation, subsea cabling and specialized marine operations. Limited operating fleets also constrain the availability of long-term reliability data required by lenders, insurers and utilities. Compared with established renewable technologies, tidal stream projects face higher financing costs, longer development periods and greater sensitivity to vessel schedules, weather windows and component failure, slowing conversion of announced project pipelines into recognized equipment revenue.

## Opportunities

The most immediate opportunity lies in converting supported demonstration capacity into repeatable pre-commercial farms. The European pipeline provides a platform for localized manufacturing, standardized turbine architectures and multi-year service businesses. Canada offers expansion potential through high-energy tidal sites and newly authorized array projects, while China’s 2025 marine energy policy calls for megawatt-scale technology development and phased construction of a 10 MW first-stage project within a planned large-scale development in Zhoushan. Additional opportunities exist in island microgrids, offshore observation systems, aquaculture, maritime electrification and hybrid systems combining tidal power with batteries, wind or solar generation.

## Challenges

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The central challenge is achieving bankable cost reduction without sacrificing reliability in harsh marine environments. Turbines must withstand reversing currents, turbulence, corrosion, biofouling, floating debris and extreme structural loads while maintaining acceptable retrieval and maintenance costs. Environmental permitting and ecological monitoring remain site-specific and can lengthen project schedules even when turbine technology is mature. Manufacturers must also manage limited supplier volumes, customized engineering, working-capital requirements and uncertainty over the timing of large orders. Industry standards, certification procedures and performance verification are improving, but broader adoption still depends on consistent long-term production data and successful operation of multi-unit farms.

## Industry Chain Analysis

The upstream industry includes composite blades, corrosion-resistant metals, marine bearings, seals, gearboxes or direct-drive generators, power electronics, subsea cables, connectors, foundations and mooring components. The midstream covers hydrodynamic design, turbine and nacelle manufacturing, platform integration, control software, factory testing, marine installation and commissioning. Downstream customers include project developers, utilities, island energy operators, coastal communities, offshore infrastructure owners and public demonstration programs. The industry chain remains project-led rather than fully standardized, making cooperation between turbine developers, shipyards, component suppliers, marine contractors and grid operators essential to successful delivery.

## Value Chain Analysis

The highest-value activities are concentrated in proprietary turbine design, hydrodynamic optimization, powertrain engineering, subsea reliability, system integration and the operating data required to validate performance. Manufacturing of structures and conventional components can be outsourced, but the turbine OEM typically retains control over product architecture, control algorithms, certification and commissioning. The report estimates an industry average gross margin of approximately 25% to 40% in 2025, although profitability varies significantly with project stage, production volume and the treatment of engineering and demonstration expenses. As the market develops, recurring monitoring, maintenance, component replacement and array optimization services are expected to account for a larger share of lifecycle value.

## Segment Insights

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By deployment configuration, seabed-mounted and floating turbines represent the principal commercial routes, while tidal kite systems form a differentiated segment for sites where device movement can increase the relative flow through the turbine. Horizontal-axis designs are the most widely adopted configuration, while vertical-axis and cross-flow systems serve specific site and platform requirements. By rated power, units below 500 kW are primarily used for testing, research, community power and offshore facilities; units from 500 kW to 1 MW support medium-scale demonstrations and localized grids; and units from 1 MW to 3 MW are increasingly targeted at commercial grid-connected arrays. Product selection is driven by resource velocity, water depth, installation access, maintenance strategy and grid requirements.

## Downstream Market Opportunities

Grid-connected generation will remain the primary source of equipment demand because commercial arrays provide the scale required to reduce unit manufacturing and installation costs. Island and remote-area electricity supply offers a differentiated opportunity where predictable tidal generation can reduce dependence on diesel and strengthen microgrid stability. Offshore observation platforms, communications equipment, aquaculture facilities and other marine infrastructure create smaller but potentially repeatable demand for lower-power systems. The strongest downstream propositions are likely to combine tidal generation with energy storage and other renewable sources, allowing customers to use predictable tidal output to improve system balancing, fuel savings and energy resilience.

## Regional Insights

Europe leads the market in technology development, operating experience, revenue support and pre-commercial project preparation. The United Kingdom is the most visible near-term market because of dedicated tidal capacity under its Contracts for Difference mechanism, while France, Spain, Sweden and the Netherlands maintain active technology and project pipelines. North America remains smaller but strategically important, with operational experience in the United States and expanding project opportunities in Canada. China is moving from long-term demonstration toward policy-supported scale-up; the LHD project in Zhoushan has operated successive generations of equipment, including a 1.6 MW unit, while national policy supports a phased 10 MW initial project. Japan and South Korea retain strong marine engineering capabilities, although strictly defined commercial tidal stream turbine manufacturing remains limited.

Competitive LandscapeThe global tidal stream turbine market is characterized by European leadership, specialized development in North America and accelerating

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progress in China. Europe hosts most active turbine manufacturers, with the United Kingdom leading in supplier concentration, project pipelines, operating experience and policy support. France, Spain, Sweden and the Netherlands maintain differentiated strengths in seabed-mounted, floating and tidal kite technologies. North American companies mainly focus on regional demonstrations, estuary and tidal channel projects, and small to medium-sized arrays, while their commercial deployment remains below the European level. China is moving from single-unit validation toward megawatt-scale turbines and multi-unit arrays, supported by its marine engineering manufacturing base and long-term demonstration experience. Japan and South Korea possess strong offshore engineering and component supply capabilities, but the number of active complete turbine manufacturers remains limited. Competition is increasingly determined by technology route, operating track record, project access, maintenance strategy, certification capability and supply-chain execution, while stable mass production has not yet been established.

## Report Scope

This report is a detailed and comprehensive analysis for global Tidal Stream Turbine 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 Tidal Stream Turbine market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (K US$/Unit), 2021-2032

Global Tidal Stream Turbine 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 Tidal Stream Turbine 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 Tidal Stream Turbine market shares of main players, shipments in revenue ($

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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 Tidal Stream Turbine

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 Tidal Stream Turbine 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 Orbital Marine Power Ltd, Nova Innovation Ltd, Proteus Marine Renewables Limited, Minesto AB, HydroQuest SAS, Tocardo B.V., Magallanes Renovables S.L., Ocean Renewable Power Company Inc., Verdant Power Inc., Hangzhou Lindong New Energy Technology Inc., etc.

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

Tidal Stream Turbine 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 Segmentation

### Market segment by Type

Horizontal Axis Tidal Turbine

Vertical Axis Tidal Turbine

Others

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## Market segment by Deployment Configuration

Seabed Mounted Tidal Turbine

Floating Tidal Turbine

Submerged Kite Tidal Turbine

Others

## Market segment by Power Rating

Below 500 kW

500 kW to 1 MW

1 MW to 3 MW

Above 3 MW

## Market segment by Application

Utility-scale Grid-connected Power Generation

Remote Area Power Supply

Marine Infrastructure Power Supply

Demonstration and Research Projects

Others

## Major players covered

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Orbital Marine Power Ltd

Nova Innovation Ltd

Proteus Marine Renewables Limited

Minesto AB

HydroQuest SAS

Tocardo B.V.

Magallanes Renovables S.L.

Ocean Renewable Power Company Inc.

Verdant Power Inc.

Hangzhou Lindong New Energy Technology Inc.

IHI Corporation

## 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)

# Chapter Outline

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Chapter 1, to describe Tidal Stream Turbine product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Tidal Stream Turbine, with price, sales quantity, revenue, and global market share of Tidal Stream Turbine from 2021 to 2026.

Chapter 3, the Tidal Stream Turbine competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Tidal Stream Turbine 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 Tidal Stream Turbine 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 Tidal Stream Turbine.

Chapter 14 and 15, to describe Tidal Stream Turbine sales channel, distributors, customers, research findings and conclusion.

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