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Global Fully Electric Tugboat Market Growth 2026-2032

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Abstracts

The global Fully Electric Tugboat market size is predicted to grow from US$ 864 million in 2025 to US$ 3410 million in 2032; it is expected to grow at a CAGR of 22.1% from 2026 to 2032.

In 2024, the global market for fully electric tugboats saw approximately 28 new constructions and deliveries, with an average unit price of approximately US$24.5 million to US$28.2 million per vessel and an industry gross margin of approximately 18% to 26%. Fully electric tugboats are zero-emission port motorized vessels that use high-capacity marine lithium batteries (or lithium-titanium batteries/lithium iron phosphate/solid-state battery plans) as the sole or primary power source, and achieve berthing, unberthing, turning, and emergency maneuvering operations through electric propellers, Z-type rudder propellers, or stern-mounted twin propellers. Typical rated thrust range is 50–90 tons, continuous power is 1.6–4.5 MW, battery capacity is 2–7 MWh (some ports use shore power + battery swapping stations to extend operating time), and endurance is generally 3–5 hours, which can meet the needs of short-distance, high-frequency missions in ports. To adapt to multi-condition operation in port areas, all-electric tugboats are usually equipped with redundant power distribution busbars, thermal management systems, shore-based intelligent charging interfaces and power control collaborative algorithms. Some leading ports, such as Rotterdam, Los Angeles, and Shenzhen Mawan Port, can form a unified scheduling system of shore power DC busbars to achieve scheduling of day and night operations. Sanmar Shipyards delivered approximately 2 fully electric tugboats annually, mainly serving near-shore ports in Turkey and the Middle East.

Supply Situation

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The core cost of a fully electric tugboat consists of the electrical system, battery pack, propulsion motor, power electronics, hull structural steel, and high-grade marine cables. Raw material costs account for approximately 62%–71% of the total vessel cost.Upstream raw material and component suppliers include: CATL, Corvus Energy, ABB, Voith, Sumitomo Electric, and BMA Technology.

Manufacturer Characteristics

Damen Shipyards delivered 6 fully electric tugboats in 2024, primarily serving medium to large-sized port clusters in Europe. Sanmar Shipyards delivered approximately 2 fully electric tugboats annually, mainly serving near-shore ports in Turkey and the Middle East.

Example

The Auckland Port Authority in New Zealand uses the 24.7-meter fully electric port tugboat RSD-E 2513 built by Damen. With a bollard pulling force of 70 tons, it can complete three to four vessel maneuvers or approximately three to four hours of working time when fully charged. A 1.5 MW charger can fully charge the RSD-E Tug 2513 in just two hours, and it is also equipped with two 1000 kW generator sets. In the event of a power system failure or if the vessel needs to operate beyond its battery capacity, these two generator sets can provide sufficient power to allow the tugboat to operate under a 40-ton bollard pull. Operating costs are less than one-third of those of diesel tugboats. Ports are expected to save approximately $12 million in operating costs, making electric tugboats more cost-effective in the long run.

Applications

All-electric tugboats are primarily used in zero-emission pilot ports and port areas with high berthing and unberthing rates for medium and large vessels. Approximately 34% of these applications are in European ports (Rotterdam, Antwerp-Bruges, Hamburg, Oslo, Gothenburg), approximately 24% in North American and Canadian ports (Los Angeles, Long Beach, Vancouver), approximately 18% in Japanese and South Korean ports, and approximately 22% in coastal Chinese ports (Shanghai, Ningbo-Zhoushan, Shenzhen Mawan, Qingdao, Lianyungang). Typical customers include the Port of LA, Rotterdam Port, Antwerp-Bruges, Tokyo Bay, CNMWN, and Svitzer.

Technology Trends

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Technology evolution directions include: high-nickel + solid-state batteries replacing lithium iron phosphate to achieve a 25-40% increase in volumetric energy density; integrated shore-based multi-node DC power grids; mechanized power replenishment via battery swapping and automated shore power docking arms; automated tugboat scheduling through port digital twin scheduling simulations; and fuel cell hybrid systems extending range to 8-14 hours to adapt to the "24-hour low-carbon scheduling mode" of large ports.

Market Influencing Factors

The International Maritime Organization (IMO) Net-Zero Emissions Pathway (net-zero emissions by 2050 + interim targets for 2030/2040) and the Green Port/Zero-Emission Berth/Shore Power Mandate of ports directly drive ports to achieve "smokeless zone" operations in their berthing areas; the Ports of Los Angeles and Long Beach require all their fleets to gradually transition to zero-emission vessels by 2030; the EU's FuelEU Maritime requires fleet fuel carbon intensity to decrease annually from 2025 to 2034; and China's Ministry of Transport's "Guidelines for the Construction of Shore Power Facilities in Ports" explicitly promotes the electrification of tugboats and port work vessels. Compared to pathways relying on hydrogen fuel or green methanol, all-electric tugboats, due to their near-shore fixed navigation areas and the feasibility of constructing high-density charging infrastructure, have become one of the earliest zero-carbon vessel types to be commercially implemented. Therefore, the newbuilding penetration rate has increased from approximately 3% in 2019 to approximately 14% in 2024, and will form a continuous replacement market among the approximately 1,900 port work tugboats in the global fleet.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Fully Electric Tugboat Industry Forecast” looks at past sales and reviews total world Fully Electric Tugboat sales in 2025, providing a comprehensive analysis by region and market sector of projected Fully Electric Tugboat sales for 2026 through 2032. With Fully Electric Tugboat sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Fully Electric Tugboat industry.

This Insight Report provides a comprehensive analysis of the global Fully Electric Tugboat landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Fully Electric

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Tugboat portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Fully Electric Tugboat market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Fully Electric Tugboat and breaks down the forecast by Bollard Pull, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Fully Electric Tugboat.

This report presents a comprehensive overview, market shares, and growth opportunities of Fully Electric Tugboat market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Bollard Pull:

40 t

60 t

70 t

Others

Segmentation by Charging Time:

2 Hours

1 Hour

Segmentation by Speed:

10 knots

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12 knots

Others

Segmentation by Draught:

5.6 m

6.5 m

Others

Segmentation by Application:

Port Authority

Tugboat Service Company

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

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China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its

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market penetration.

NYK Line

Seaspan

Damen Shipyards

Arc

Crowley

Sanmar

Tokyo Kisen

Kanagawa Dockyard

Cochin Shipyard

Ripley Group

Navtek Naval Technologies

Daito Corporation

Lianyungang Port Holding Group Barge Branch

Key Questions Addressed in this Report

What is the 10-year outlook for the global Fully Electric Tugboat market?

What factors are driving Fully Electric Tugboat market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

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How do Fully Electric Tugboat market opportunities vary by end market size?

How does Fully Electric Tugboat break out by Bollard Pull, by Application?

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