

Tidal Energy Market by Technology (Tidal Stream/Current, Tidal Range, Other/Emerging), Deployment (Fixed, Floating, Tethered, Other), Application (Utility-scale Power Generation, Distributed/Island Power, Other Applications), and Region – Global Forecast to 2031

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Abstracts

The global tidal energy market is projected to grow from USD 0.0506 billion in 2026 to USD 0.1985 billion by 2031, at a CAGR of 31.4%. Market growth is supported by expanding marine renewable energy infrastructure, rising investments in tidal energy projects, and growing deployment of tidal power systems across coastal regions, island communities, and utility-scale power generation facilities. Technology developers are deploying advanced tidal turbine architectures to improve energy conversion efficiency, power output, operational reliability, and performance under varying tidal flow conditions. Increasing adoption of advanced turbine control systems, remote monitoring, digital diagnostics, predictive maintenance, subsea electrical systems, and automated control technologies is further accelerating demand for advanced tidal energy platforms. The development of grid-connected tidal arrays and hybrid renewable energy systems is also pushing technology providers to develop scalable tidal energy solutions that operate efficiently under diverse marine conditions and support reliable, low-carbon electricity generation.

Growing investments in advanced tidal turbine technologies, digital control systems, marine monitoring solutions, and intelligent energy-management platforms are transforming the way project developers and utilities optimize tidal power generation. Advances in AI-driven diagnostics, IoT-enabled turbine monitoring, cloud-based asset-management platforms, and real-time performance optimization are enabling operators

to improve energy output, identify abnormal operating conditions, reduce maintenance requirements, and enhance the reliability of tidal energy systems. The development of advanced turbine materials, subsea electrical systems, predictive maintenance technologies, and remote monitoring solutions is further driving innovation in tidal energy technologies that can operate efficiently under changing marine and tidal conditions. These developments are expected to strengthen tidal energy's role in building reliable, efficient, predictable, and digitally connected renewable power infrastructure.

“Floating, by deployment, is expected to record the fastest growth throughout the forecast period.”

Floating tidal energy systems are expected to grow strongly as investments in marine renewable energy projects, deep-water tidal resources, and offshore power generation infrastructure continue to increase. These systems are particularly suitable for locations where seabed conditions, water depth, or installation constraints make fixed-bottom deployment challenging. The expansion of tidal energy development into deeper waters and areas with strong tidal currents is supporting demand for floating platforms that can capture energy while reducing dependence on complex seabed foundations. Manufacturers and technology developers are increasingly developing lightweight, modular, and highly durable floating tidal platforms with improved turbine efficiency, mooring systems, subsea electrical connections, and enhanced resistance to harsh marine conditions. Increasing integration of remote monitoring, predictive maintenance, digital control systems, and autonomous operations is particularly valuable for floating applications because they can reduce offshore intervention requirements and improve system availability. These trends are expected to support faster adoption of floating tidal energy systems during the forecast period.

“Distributed/Island power, by application, is expected to register the highest CAGR throughout the forecast period.”

Island and remote power systems are expected to witness increasing adoption of tidal energy as coastal communities and island regions seek reliable, low-carbon alternatives to diesel-based electricity generation and other conventional power sources. Tidal energy is particularly attractive for these applications because tidal cycles are highly predictable, enabling consistent power generation and complementing variable renewable sources such as solar and wind. Remote and island communities are increasingly investing in decentralized renewable energy systems to improve energy

security, reduce fuel transportation costs, and lower dependence on imported fossil fuels. Technology developers are developing compact, modular tidal turbines with improved energy conversion efficiency, simplified installation, remote monitoring, and enhanced resistance to harsh marine conditions to meet the needs of distributed power applications. Integrating tidal energy with battery storage, microgrids, solar power, and advanced energy management systems is further improving power reliability and system flexibility. In addition, increasing government support for marine renewable energy projects, coastal electrification initiatives, and decarbonization programs is creating opportunities for tidal energy deployment in island and remote communities, supporting rapid growth in the distributed/island power segment.

Breakdown of Primaries

In-depth interviews with key industry participants, subject-matter experts, C-level executives of key market players, and directors, among other experts, were conducted to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The primary interviews were distributed as follows:

By Company Type: Tier 1 - 65%, Tier 2 - 24%, and Tier 3 - 11%

By Designation: C-level Executives - 30%, Directors - 25%, Others – 45%

By Region: North America – 20%, Europe – 35%, Asia Pacific – 30%, Rest of the World – 15%.

Note: Other designations include sales managers, engineers, and regional managers.

Tier 1 company: revenue: >USD 5 billion; tier 2 company revenue: between USD 1 and USD 5 billion; and tier 3 company revenue: <USD 1 billion in 2025 Well-established renewable energy companies, marine energy technology developers, and tidal turbine manufacturers govern this market. Key players profiled in the report include Andritz (Austria), Orbital Marine Power (UK), Nova (UK), Minesto AB (Sweden), Ampeak Energy (UK), HydroQuest (France), Magallanes Renovables, S.L. (Spain), ORPC, Inc. (US), Tocardo B.V. (Netherlands), SCHOTTEL Group (Germany), Inyanga Maritime Ltd. (UK), MAKO Energy (UK), Instream Energy Systems Corp. (Canada), Guinard Energies Nouvelles (France), EEL Energy (France), Kepler Energy (UK), Aquantis, Inc. (US), Jupiter Hydro Inc. (Canada), Carnegie Clean Energy (Australia), Voith GmbH & Co. KGaA (Germany), Tidal Technologies Ltd (UK), Tidal Stream Energy Ltd (UK),

Yourbrook Energy Systems (Canada), QED Naval Limited (UK), and SeaCurrent (Netherlands). These companies compete through advanced tidal turbine technologies, marine engineering capabilities, project development expertise, established technology partnerships, and strong capabilities in installation and maintenance services. Their technology innovation, turbine efficiency improvements, project development activities, geographic expansion, and investments in digital monitoring, predictive maintenance, and scalable tidal energy systems continue to shape the competitive landscape.

Research Coverage

The report provides a comprehensive definition, description, and forecast of the tidal energy market by technology (Tidal Stream/Current, Tidal Range, Other/Emerging), deployment (Fixed, Floating, Tethered, Other), application (Utility-scale Power Generation, Distributed/Island Power, Other Applications), and region (North America, Europe, Asia Pacific, and Rest of the World). It delivers qualitative analysis of market drivers, restraints, opportunities, and challenges. The study also includes competitive landscape assessment, market sizing and forecasts, technology trends, ecosystem analysis, commercial use cases, company benchmarking, project and deployment analysis, and recent developments to provide a comprehensive view of the tidal energy market.

Key Benefits of Buying the Report

The report supports tidal energy technology developers, turbine manufacturers, project developers, utilities, investors, policymakers, marine engineering companies, and other stakeholders in understanding the evolving tidal energy market. It provides reliable market forecasts across major technologies, deployment types, applications, and regions while delivering insights into technology adoption, project development, competitive positioning, and future growth opportunities. The report enables stakeholders to make informed business decisions through detailed market intelligence, project and deployment analysis, technology assessment, and strategic insights.

Analysis of key market dynamics: Covers the major drivers (growing global demand for reliable low-carbon electricity, increasing investments in marine renewable energy infrastructure and tidal power projects, rising focus on energy security and decarbonization, and growing deployment of tidal energy in utility-scale, island, and hybrid renewable energy applications), restraints (high upfront capital costs associated with tidal energy projects and marine infrastructure), opportunities (increasing development of floating tidal energy systems, advancements in tidal turbine technologies, integration of tidal power with

energy storage and offshore wind, and growing government support for marine renewable energy projects), and challenges (harsh marine operating conditions, environmental and regulatory requirements, complex installation and maintenance activities, and limited availability of suitable tidal sites) influencing market growth.

Technology and Product Innovation: Examines advancements in high-efficiency tidal turbines, advanced power-conversion systems, intelligent turbine-control technologies, remote monitoring, digital diagnostics, and predictive maintenance systems that are transforming tidal power generation across utility-scale, distributed/island, and hybrid renewable energy applications. Technology developers are also developing tidal energy systems with improved energy capture, higher power output, enhanced durability, simplified installation, and compatibility with subsea electrical infrastructure, floating platforms, and energy storage systems.

Market Development: Highlights how increasing investments in marine renewable energy infrastructure, development of tidal power projects, expansion of grid-connected tidal arrays, and growing government support for ocean energy are accelerating demand for tidal energy technologies across global coastal markets. Investments in utility-scale tidal projects, island electrification, subsea power infrastructure, and marine energy demonstration projects are further supporting market development. Advancements in turbine efficiency, marine installation techniques, and grid integration are also improving the commercial viability of tidal energy projects.

Market Diversification: Evaluates expanding tidal energy applications beyond conventional utility-scale power generation into distributed/island power, remote communities, industrial applications, hybrid renewable energy systems, offshore renewable energy hubs, and microgrids, creating new revenue opportunities for market participants. Integrating tidal energy with battery storage, offshore wind, solar power, IoT-enabled monitoring, predictive maintenance platforms, and digital energy-management systems is also creating opportunities for technology developers to expand from standalone tidal turbines to integrated marine renewable energy solutions.

Competitive Assessment: Provides detailed analysis of leading companies including Andritz (Austria), Orbital Marine Power (UK), Nova (UK), Minesto AB (Sweden), Ampeak Energy (UK), HydroQuest (France), Magallanes

Renovables, S.L. (Spain), ORPC, Inc. (US), Tocardo B.V. (Netherlands), SCHOTTEL Group (Germany), Inyanga Maritime Ltd. (UK), MAKO Energy (UK), Instream Energy Systems Corp. (Canada), Guinard Energies Nouvelles (France), EEL Energy (France), Kepler Energy (UK), Aquantis, Inc. (US), Jupiter Hydro Inc. (Canada), Carnegie Clean Energy (Australia), Voith GmbH & Co. KGaA (Germany), Tidal Technologies Ltd (UK), Tidal Stream Energy Ltd (UK), Yourbrook Energy Systems (Canada), QED Naval Limited (UK), and SeaCurrent (Netherlands), covering their product portfolios, strategic initiatives, technological capabilities, and competitive positioning.

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