

Tidal Power Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented by Power Generation Method (Tidal Barrage, Floating Tidal Power Platform, Tidal Stream Generation, and Dynamic Tidal Power), by Tidal Energy Converters (Horizontal Axis Turbine, Vertical Axis Turbine, and Other Tidal Energy Converters), By Region, Competition 2018-2028.

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Abstracts

Global Tidal Power Market was valued at USD 591.23 Million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 9.02% through 2028, The market is likely to grow in the future due to the global energy transition toward renewables and the rollout of new technologies in many developed countries.

Key Market Drivers

Renewable Energy Demand

The burgeoning demand for renewable energy sources is emerging as a potent driver behind the rapid expansion of the global tidal power market. As the world grapples with the pressing issues of climate change and the need to reduce greenhouse gas emissions, there is a growing appetite for clean and sustainable energy solutions, and tidal power is primed to play a pivotal role. One of the primary factors driving the tidal power market is the global shift towards renewable energy. The escalating awareness of the environmental consequences of fossil fuel dependency, coupled with international commitments to reduce carbon emissions under agreements like the Paris Agreement,

has led to a heightened emphasis on clean energy alternatives. Tidal power, as a renewable energy source, provides a compelling solution to meet these goals.

Tidal energy harnesses the gravitational forces between the Earth, the moon, and the sun to generate electricity. This process is inherently sustainable and inexhaustible, as tidal cycles are governed by celestial movements and will persist for eons to come. Unlike finite fossil fuels, tidal power offers a reliable and perpetual source of clean energy. The appeal of tidal power is further amplified by its predictability. Tidal cycles follow well-defined patterns, with regular intervals of high and low tides. This predictability makes it a dependable energy source, ensuring a steady supply of electricity to meet the increasing global energy demand.

Governments and policymakers are recognizing the importance of tidal energy in their renewable energy portfolios. Many nations have introduced supportive policies, incentives, and subsidies to encourage the development of tidal power projects. These measures stimulate investment, research, and innovation in the sector, propelling its growth on the global stage. Furthermore, the integration of tidal power into the energy mix contributes to energy security. By diversifying the sources of energy generation, nations become less reliant on volatile fossil fuel markets and geopolitical factors that can disrupt energy supplies. In conclusion, the rising global demand for renewable energy, driven by environmental concerns, international commitments, and energy security considerations, is serving as a formidable catalyst for the expansion of the global tidal power market. Tidal energy's sustainability, predictability, and government support make it a pivotal player in the transition to a cleaner and more sustainable energy landscape, poised to meet the world's energy needs while mitigating the impacts of climate change.

Predictable Energy Generation

Predictable energy generation stands out as a powerful driver propelling the growth of the global tidal power market. In an era where energy reliability and stability are paramount, the inherent predictability of tidal energy production offers a unique and valuable advantage. Tidal power generation is driven by the gravitational pull of the moon and the sun, leading to highly predictable and rhythmic tidal cycles. These cycles, consisting of two high tides and two low tides each day, occur with remarkable regularity and can be accurately forecasted years in advance. This predictability is a stark contrast to some other renewable energy sources like wind and solar, which are subject to natural variability and intermittency.

The dependability of tidal energy is a critical asset for power grid operators and energy planners. It enables precise energy forecasting and scheduling, allowing for efficient grid integration and load management. Unlike variable energy sources, such as wind or solar, which can pose challenges for grid stability due to their fluctuations, tidal power provides a consistent and reliable source of electricity. This predictability reduces the need for energy storage systems or backup generation capacity, ultimately enhancing the overall grid reliability.

Furthermore, the consistency of tidal energy production aligns well with energy demand patterns. Many regions experience peak electricity demand during predictable timeframes, such as morning and evening, which often coincide with tidal cycles. Tapping into this alignment between energy supply and demand can help optimize energy utilization, reducing wastage and energy costs. The dependability of tidal energy is a key factor in its attractiveness to investors and project developers. The assurance of a consistent energy output simplifies project planning, financing, and risk management. Investors are more inclined to support tidal energy projects when they can predict returns with a high degree of confidence. In summary, the predictability of energy generation in tidal power is a compelling driver for its global market expansion. It not only addresses the challenges associated with intermittent renewable sources but also enhances grid stability, energy planning, and investment attractiveness. As the world seeks more reliable and sustainable energy solutions, the dependable nature of tidal power is poised to play a pivotal role in the global energy transition.

Low Environmental Impact

The low environmental impact of tidal power is poised to be a compelling driver for the global tidal power market. In a world grappling with the urgent need to address climate change and reduce greenhouse gas emissions, the eco-friendly nature of tidal energy stands out as a significant advantage. Tidal power generation produces virtually no greenhouse gas emissions during its operation. Unlike fossil fuels, which release harmful pollutants and contribute to global warming, tidal power harnesses the gravitational forces between the Earth, the moon, and the sun to generate electricity. This means that the carbon footprint associated with tidal energy is remarkably low, making it a vital contributor to the transition towards cleaner and more sustainable energy sources. Furthermore, tidal power projects have a minimal impact on local ecosystems compared to other forms of renewable energy. Large-scale hydropower dams, for example, often disrupt river ecosystems and fish migration patterns. In contrast, tidal turbines are typically placed on the seafloor, where they have limited impact on marine life and the surrounding environment. This mitigates concerns about

habitat disruption and allows for coexistence with marine ecosystems.

The aesthetic and noise pollution associated with some renewable energy installations, such as wind farms, are also absent in tidal energy installations. Tidal turbines operate silently underwater and are mostly hidden from view, preserving the natural beauty of coastal areas and reducing potential conflicts with tourism and local communities. The environmental benefits of tidal power make it an attractive option for governments and policymakers aiming to meet their climate targets and reduce their nations' carbon footprints. As countries strive to transition to sustainable energy sources, the low environmental impact of tidal power is likely to drive increased investments, research, and development in the sector. This, in turn, will lead to the growth of the global tidal power market, helping to secure a greener and more sustainable future for our planet.

Key Market Challenges

High Capital Costs

High capital costs represent a significant hurdle in the global tidal power market, impeding its widespread adoption and growth. While tidal energy holds immense potential as a reliable and sustainable source of electricity, the substantial initial investments required for its development pose a formidable challenge for both investors and project developers. Tidal power projects demand substantial financial resources to design, engineer, and construct specialized infrastructure, including tidal turbines, underwater generators, and associated grid connections. The costs associated with building and deploying these components can be prohibitively high, deterring potential stakeholders from entering the market. Furthermore, the development of underwater infrastructure necessitates expertise in marine engineering, which often adds an additional layer of cost and complexity.

One of the primary drivers behind these high capital costs is the unique nature of tidal energy systems. They must be built to withstand the harsh marine environment, which includes strong tidal currents, saltwater corrosion, and unpredictable underwater conditions. Designing, manufacturing, and maintaining equipment capable of enduring these challenges adds a premium to project expenses. The high capital costs also raise concerns about project financing. Securing funding for tidal power projects can be challenging due to the perceived risks associated with this emerging technology. Lenders and investors may be hesitant to commit to projects with such substantial initial expenditures, especially when compared to more established renewable energy sources like wind and solar.

Moreover, the long payback period associated with tidal power projects can further deter investors. It often takes several years for a tidal energy project to start generating a return on investment, making it less attractive when compared to other renewable energy sources with shorter payback periods.

Addressing the challenge of high capital costs in the tidal power sector requires a multifaceted approach. This includes continued research and development efforts aimed at reducing equipment costs, streamlining installation processes, and improving the overall efficiency of tidal energy systems. Government incentives, subsidies, and financial support mechanisms can also play a crucial role in mitigating the financial burden on investors and developers. In conclusion, the formidable barrier of high capital costs poses a significant challenge to the global tidal power market. Overcoming this challenge will require ongoing technological innovation, cost reduction strategies, and collaborative efforts between governments, investors, and industry stakeholders. As these barriers are progressively dismantled, the potential of tidal power to contribute to a cleaner and more sustainable energy future becomes increasingly attainable.

Limited Geographic Applicability

The limited geographic applicability of tidal power stands as a significant impediment to the global growth of this renewable energy source. Tidal power, while highly promising and environmentally friendly, is constrained by its reliance on specific geographic conditions, primarily the presence of strong and predictable tidal currents. This inherent limitation restricts the scope of where tidal energy projects can be developed and, in turn, hampers the overall expansion of the global tidal power market. Tidal energy generation is most effective in regions characterized by substantial tidal ranges, typically found in coastal areas, estuaries, and certain narrow channels. These locations experience significant variations in water levels between high and low tides, creating strong tidal currents that can be harnessed for power generation. Consequently, regions with limited or inconsistent tidal fluctuations lack the prerequisites for viable tidal power projects, narrowing the scope of potential development.

This geographic constraint can lead to several challenges for the global tidal power market, Resource Availability: Only a fraction of coastal areas worldwide possesses the necessary tidal resources to support economically viable tidal power projects. This limited resource availability restricts the number of regions where tidal energy can be harnessed. Infrastructure Costs: Developing tidal power projects in remote or geographically constrained locations often entails higher infrastructure costs. The need

for specialized equipment and transportation to these areas can drive up project expenses. Grid Integration Challenges: Locating tidal power projects far from urban centers can present challenges in integrating the generated electricity into the existing grid infrastructure, which may not have been designed for such remote energy sources.

Environmental Impact: In some cases, the regions with the most suitable tidal resources may also be ecologically sensitive areas. Balancing the potential environmental impact with the benefits of tidal power generation can be a complex challenge. **Land Use Conflicts:** Coastal areas are frequently shared by various stakeholders, including shipping, fishing, tourism, and conservation interests. Conflicts over land and resource use can complicate project development and permitting. To overcome the geographic limitations of tidal power, innovation and technological advancements are essential. Researchers and developers are exploring ways to capture tidal energy in a broader range of conditions, including weaker tidal currents and different coastal environments. This research aims to expand the geographic applicability of tidal energy, making it a more viable option for a greater number of regions worldwide. In conclusion, while the limited geographic applicability of tidal power presents a notable challenge, ongoing efforts to broaden the technology's reach and adapt it to varying environmental conditions offer hope for the continued development and growth of the global tidal power market.

Infrastructure Maintenance

Infrastructure maintenance represents a substantial challenge in the global tidal power market, potentially hampering the growth and sustainability of tidal energy projects. While tidal power offers numerous benefits, including renewable and predictable energy generation, the unique underwater environment in which these systems operate presents complex and costly maintenance requirements. One of the primary concerns in tidal power infrastructure maintenance is the harsh marine environment. Tidal turbines and associated equipment are submerged in corrosive saltwater and subjected to powerful tidal currents, which can lead to accelerated wear and tear. This challenging environment necessitates regular inspections, maintenance, and repairs to ensure the longevity and reliability of the infrastructure.

Accessing and servicing underwater tidal energy installations is itself a significant logistical challenge. Divers or remotely operated vehicles (ROVs) are often required to perform inspections and maintenance, which can be costly and time-consuming. Moreover, the need to coordinate maintenance activities with tidal cycles adds complexity to scheduling, as underwater work can typically only occur during slack tides

when currents are at their weakest. Another maintenance concern is biofouling. Marine growth, such as barnacles and algae, can accumulate on the submerged equipment over time, affecting the efficiency of tidal turbines and increasing drag on their blades. This biofouling requires regular cleaning and anti-fouling measures to prevent performance degradation.

Structural integrity is also a significant consideration in tidal power infrastructure maintenance. Components exposed to tidal currents and underwater forces must be inspected for damage and wear, with any necessary repairs or replacements performed promptly to ensure safe and efficient operation. Furthermore, maintaining the electrical systems and grid connections that transmit the generated power to the grid is critical. Subsea power cables and electrical components are susceptible to damage and require monitoring and maintenance to prevent power losses and potential hazards.

Addressing the challenges of infrastructure maintenance in tidal power requires ongoing research and innovation in materials science and engineering. Developing materials and coatings that can withstand the corrosive marine environment, as well as designing more robust and easily maintainable components, is crucial. Additionally, advanced inspection technologies, including autonomous underwater vehicles (AUVs) and remotely operated vehicles (ROVs), can help streamline maintenance processes and reduce costs. In conclusion, infrastructure maintenance poses a substantial challenge in the global tidal power market due to the demanding underwater environment in which these systems operate. Addressing these maintenance challenges is vital for the long-term success and sustainability of tidal energy projects, and ongoing research and innovation are essential to overcoming these obstacles and maximizing the potential of this promising renewable energy source.

Key Market Trends

Technology Advancements

Technology advancements are poised to be a major catalyst in driving the growth of the global tidal power market. As innovation continues to surge in the renewable energy sector, tidal power is benefiting from cutting-edge developments that are making it more efficient, cost-effective, and environmentally friendly. One key advancement lies in the improvement of tidal turbine designs. Innovative turbine designs, such as horizontal-axis and vertical-axis turbines, are enhancing energy capture efficiency while reducing maintenance requirements. Additionally, the integration of advanced materials and coatings is increasing the durability and longevity of tidal power infrastructure in harsh

marine environments. Moreover, the integration of smart grid technologies and energy storage solutions is addressing the issue of intermittent tidal energy generation. This enables a more reliable and consistent power supply to the grid, enhancing its overall viability as a baseload energy source.

Furthermore, the use of predictive analytics and machine learning algorithms is optimizing tidal energy generation by accurately forecasting tidal patterns and optimizing turbine operation accordingly. Overall, these technology advancements are not only increasing the energy output of tidal power systems but also lowering the levelized cost of energy, making tidal power a more attractive option for governments and investors looking to expand their renewable energy portfolios. As technology continues to advance, the global tidal power market is well-positioned to play a significant role in the transition to a more sustainable and diversified energy mix.

Commercial-Scale Deployments

Commercial-scale deployments are poised to be a driving force behind the growth of the global tidal power market. As the world seeks sustainable and renewable energy sources to combat climate change, tidal power stands out as a reliable and eco-friendly option. The transition from small-scale pilot projects to large-scale commercial installations is gathering momentum, unlocking the immense potential of harnessing the energy of tides.

These commercial deployments offer several advantages. Firstly, they provide valuable data and insights to improve technology efficiency and reliability, making tidal power more economically viable. Secondly, they attract significant investments, fostering innovation and infrastructure development. As governments and industries commit to reducing carbon emissions, tidal power's predictability and consistent energy generation make it an attractive option. Furthermore, commercial-scale deployments help establish tidal power as a dependable part of the global energy mix, reducing reliance on fossil fuels and contributing to a greener future. This shift towards large-scale projects will undoubtedly propel the global tidal power market forward, making it a vital player in the renewable energy landscape. The commercialization of tidal power is a pivotal step toward a more sustainable and resilient energy future.

Segmental Insights

Power Generation Method Insights

The Floating Tidal Power Platform segment holds a significant market share in the Global Tidal Power Market. Tidal energy uses tidal currents consistent in volume and direction throughout the year, making it an incredibly efficient renewable energy source with a high-power output. The tidal power market recently witnessed increased floating power production system deployments. In the system, the turbines are aligned in a particular way and attached to a standard moving beam. They produce more energy as compared to fixed structures.

The US Department of Energy has a Waterpower Program to develop marine energy and technologies. In October 2022, the US Department of Energy agreed to fund USD 35 million to advance tidal and river current energy systems as part of measures to boost a sector whose current impact is negligible. Such developments will likely significantly boost the market due to the expansion of floating/instream tidal energy platform installations.

Regional Insights

Europe plays a significant role in the global Tidal Power market; Europe planned a series of tidal power plants coming into operation or getting grid-connected recently. Countries like the United Kingdom and Denmark are the most highlighted parts of the region.

According to a 2021 study conducted by experts at Edinburgh University, tidal stream alone has the potential to produce 11% of the United Kingdom's current annual electricity demand, which is the same as the combined contribution of solar and biomass over the previous year. Moreover, in May 2022, Minesto completed the first week of commissioning the Dragon 4 tidal power plant in Vestmanna, Faroe Islands, Denmark, including energy production and verification of all critical operations. Minesto's Deep Green Kite technology is cost-effective in places with low-flow tidal streams and ocean currents.

Such developments will likely boost the region's position in the tidal power market's growth.

Key Market Players

Andritz AG

Nova Innovation Ltd

Orbital Marine Power Ltd

MAKO Turbines Pty Ltd

SIMEC Atlantis Energy Ltd

Hydroquest SAS

Sustainable Marine Energy Ltd

Lockheed Martin Corporation

Report Scope:

In this report, the Global Tidal Power Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Tidal Power Market, By Power Generation Method:

Tidal Barrage

Floating Tidal Power Platform

Tidal Stream Generation

Dynamic Tidal Power

Global Tidal Power Market, By Tidal Energy Converters:

Horizontal Axis Turbine

Vertical Axis Turbine

Other

Global Tidal Power Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Tidal Power Market.

Available Customizations:

Global Tidal Power Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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