

Wave And Tidal Energy Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (Wave Energy, Tidal Energy), By Technology (Tidal stream generator, Oscillating Water Columns, Tidal turbines, Tidal barrages, Tidal fences), By Application (Power generation, Desalination) By Region, By Competition 2018-2028.

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Abstracts

Global Wave And Tidal Energy Market was valued at USD 528.35 Million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 24.35% through 2028. Wave energy is defined as the energy of the ocean surface waves, which is captured for electricity generation, desalination, and for pumping of water into reservoirs. Wave and tidal energies are the most promising green technologies, as they generate the most concentrated source of renewable energy. Oceans are an inexhaustible source of clean energy. Therefore, harnessing tidal and wave energy from the ocean surfaces is expected to be the most sustainable source of energy. They are the sustainable methods of harnessing energy of oceans for power generation. Countries across the world tend to utilize these forms of renewable energy, as these provide a constant and steady source of clean energy. Abundance of ocean surface and energy generation capacity in several nations has promoted governments to pursue ocean energy generation as an important source of their renewable energy in future. In addition, tidal energy works through a wind like turbine, with blades rotating 12-to-18 times a minute, depending on tide strength. The turbine is connected to a gearbox that turns a generator, creating electricity. Moreover, wave-driven power is a type of power generation related to tidal power. Rather than relying on the tidal movements in large bodies of water, wave energy is derived from wind-driven waves. It can be used to generate electricity.

Key Market Drivers

Renewable Energy Transition

One of the primary drivers of the global wave and tidal energy market is the global transition towards renewable energy sources. Concerns about climate change, greenhouse gas emissions, and the finite nature of fossil fuels have prompted governments, businesses, and consumers to seek cleaner alternatives. Wave and tidal energy are considered a vital component of this transition, as they offer a consistent and predictable source of renewable power.

Abundant Marine Resources

The world's oceans offer an immense and largely untapped source of energy. The energy potential of ocean waves and tides is substantial, and many coastal regions around the world are well-suited for harnessing these resources. This abundance of marine resources makes wave and tidal energy an attractive option for countries looking to diversify their energy mix and reduce reliance on fossil fuels.

Energy Security and Independence

Wave and tidal energy contribute to energy security and independence. Countries with access to ocean resources can generate power locally, reducing their dependence on imported fossil fuels and enhancing their energy security. This is particularly important in regions vulnerable to energy supply disruptions. Wave and tidal energy are environmentally friendly sources of electricity generation. They produce no greenhouse gas emissions or air pollutants, which helps mitigate climate change and improve air quality. Furthermore, marine energy projects have a relatively small physical footprint and minimal impact on local ecosystems compared to some other renewable energy sources.

Predictable and Consistent Energy Source

Unlike some renewable energy sources like wind and solar, which can be intermittent, wave and tidal energy offer a consistent and predictable source of power. Ocean waves and tides follow well-defined patterns and can be accurately predicted, making it easier to integrate marine energy into the grid and meet energy demand reliably.

Reduction of Carbon Footprint

Governments and businesses worldwide are under increasing pressure to reduce their carbon footprints and achieve carbon neutrality. Wave and tidal energy contribute to these efforts by providing a clean, low-carbon energy source. As emissions reduction targets become more stringent, the demand for such renewable energy solutions is expected to grow.

Technological Advancements

Advancements in technology have significantly improved the efficiency and cost-effectiveness of wave and tidal energy systems. Innovations in materials, design, and engineering have led to the development of more reliable and efficient marine energy devices. These advancements have made it increasingly feasible to harness marine energy at competitive costs.

Research and Development Investments

Public and private sector investments in research and development (R&D) for wave and tidal energy have been substantial. Governments and organizations around the world have allocated funding to support R&D initiatives, aiming to accelerate the commercialization of marine energy technologies. These investments have led to breakthroughs in device design, performance optimization, and resource assessment.

Job Creation and Economic Growth

The wave and tidal energy sector have the potential to create jobs and stimulate economic growth, particularly in coastal regions. Building, operating, and maintaining marine energy projects require a skilled workforce, providing employment opportunities in areas that may have faced economic challenges in the past.

Energy Export Opportunities

Countries with significant wave and tidal energy resources can explore energy export opportunities. By generating surplus electricity from marine energy, they can export clean power to neighboring regions or countries, strengthening economic ties and benefiting from energy trade.

Energy Diversity

Diversifying the energy mix is a key strategy for ensuring energy resilience and stability. Wave and tidal energy complement other renewable sources like wind and solar, providing a diversified portfolio of renewable energy options that can meet varying energy demand patterns.

Supportive Policies and Incentives

Government policies and incentives play a crucial role in driving the adoption of wave and tidal energy. Many countries have introduced feed-in tariffs, tax incentives, and subsidies to promote the development of marine energy projects. Additionally, renewable energy targets and regulations that prioritize clean energy sources have created a favorable environment for wave and tidal energy investments.

Public Awareness and Acceptance

Growing public awareness and acceptance of renewable energy solutions have contributed to the development of the wave and tidal energy market. Concerns about environmental sustainability and the desire to transition away from fossil fuels have garnered public support for marine energy projects.

International Collaboration

International collaboration and knowledge-sharing have accelerated the growth of the global wave and tidal energy market. Research organizations, industry associations, and governments from different countries work together to share best practices, research findings, and technological innovations, facilitating the development and deployment of marine energy technologies.

In conclusion, the global wave and tidal energy market are driven by a combination of factors, including the worldwide shift towards renewable energy, abundant marine resources, energy security, environmental benefits, predictability, and advancements in technology. Additionally, research and development investments, job creation, economic growth, energy export opportunities, energy diversity, supportive policies, public awareness, and international collaboration all play pivotal roles in propelling the growth of this promising renewable energy sector. As the world continues to prioritize clean energy sources, wave and tidal energy are expected to play an increasingly significant role in meeting global energy needs while mitigating the impacts of climate change.

Key Market Challenges

High Initial Capital Costs

One of the most significant challenges facing the wave and tidal energy industry is the high initial capital costs associated with developing and deploying these technologies. Building and installing wave and tidal energy devices, such as wave energy converters (WECs) and tidal turbines, can be expensive. The cost of designing, testing, and manufacturing these specialized devices, as well as installing them in harsh marine environments, presents a significant financial barrier. In addition to high upfront costs, operational and maintenance expenses for wave and tidal energy systems can also be substantial. These systems operate in challenging offshore conditions, which require regular maintenance and monitoring to ensure their continued operation. Dealing with the corrosive effects of saltwater, fouling by marine organisms, and the need for specialized vessels and equipment for maintenance drives up ongoing costs.

Uncertainty in Energy Resource Assessment: Another challenge is the inherent uncertainty in assessing the energy potential of specific wave and tidal sites. Accurately predicting the availability and intensity of waves and tides at a particular location is complex and often requires extensive data collection and analysis. Variability in these resources can affect the reliability and predictability of energy generation.

Environmental and Regulatory Concerns: Wave and tidal energy projects can face environmental and regulatory challenges. Concerns about the impact of energy extraction on marine ecosystems, including potential effects on marine life and habitats, can lead to regulatory hurdles and public opposition. Ensuring that projects comply with environmental regulations and address stakeholder concerns is crucial but can be complex and time-consuming.

Grid Integration and Infrastructure: Connecting wave and tidal energy systems to the electrical grid is a logistical challenge. Many potential project sites are located in remote or offshore locations, requiring the development of appropriate grid infrastructure to transport electricity to consumers. Grid integration issues, including transmission losses, grid stability, and capacity planning, need to be addressed.

Technological Reliability and Durability: Ensuring the long-term reliability and durability of wave and tidal energy devices is a significant technical challenge. The harsh marine environment, including storms and corrosive seawater, can lead to wear and tear on

equipment. Extensive research and development efforts are required to design and engineer robust devices that can withstand these conditions.

Competing Energy Sources: Wave and tidal energy must compete with other renewable and non-renewable energy sources in the market. The availability of cheaper and more established sources like wind and solar energy can make it challenging for wave and tidal energy to gain a competitive foothold, especially in regions with abundant wind or solar resources.

Lack of Standardization: The wave and tidal energy industry lacks standardization, which can lead to higher costs and slower development. Establishing industry-wide standards for device design, performance assessment, and grid integration could help streamline the development process and reduce costs.

Access to Funding and Investment: Securing funding and investment for wave and tidal energy projects can be challenging. Investors often perceive these technologies as high-risk due to their relatively early stage of development and the uncertainties associated with marine energy resource assessment.

In summary, while wave and tidal energy hold significant potential as clean and renewable energy sources, the high costs of technology development and deployment, along with challenges related to resource assessment, environmental concerns, grid integration, and competition from other energy sources, represent the primary challenges facing the global wave and tidal energy market. Addressing these challenges will be essential for the industry's growth and widespread adoption as a sustainable energy solution.

Key Market Trends

Technology Advancements

Technology advancements are poised to be a major catalyst in driving the growth of the global Wave And Tidal Energy market. As innovation continues to surge in the renewable energy sector, Wave And Tidal Energy 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 Wave And Tidal Energy 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 Wave And Tidal Energy systems but also lowering the levelized cost of energy, making Wave And Tidal Energy a more attractive option for governments and investors looking to expand their renewable energy portfolios. As technology continues to advance, the global Wave And Tidal Energy 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 Wave And Tidal Energy market. As the world seeks sustainable and renewable energy sources to combat climate change, Wave And Tidal Energy 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 Wave And Tidal Energy 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 Wave And Tidal Energy 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 Wave And Tidal Energy market forward, making it a vital player in the renewable energy landscape. The commercialization of Wave And Tidal Energy is a pivotal step toward a more sustainable and resilient energy future.

Segmental Insights

Technology Insights

By technology, the tidal stream generator segment dominated the global wave and tidal energy market in 2020, and is projected to remain the fastest-growing segment during the forecast period. This is attributed to rise in the tidal energy infrastructure leading to increase in demand for tidal stream generator, which may act as the major driving factor for the market.

Application Insights

By application, the power generation segment dominated the global wave and tidal energy market in 2020, and is projected to remain the fastest-growing segment during the forecast period. This is attributed to rising dependency on electricity, which may act as the major driving factor for the market. Moreover, driving factors include a shift toward cleaner fuel sources and plans to increase the proportion of renewable energy in the absolute power generation mix across the globe including all the major developed and emerging economies.

Regional Insights

Europe plays a significant role in the global Wave And Tidal Energy market; Europe planned a series of Wave And Tidal Energy 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 Wave And Tidal Energy 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 Wave And Tidal Energy 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 Wave And Tidal Energy Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Wave And Tidal Energy Market, By Type:

Wave Energy

Tidal Energy

Wave And Tidal Energy Market, By Technology:

Tidal stream generator

Oscillating Water Columns

Tidal turbines

Tidal barrages

Tidal fences

Wave And Tidal Energy Market, By Application:

Power generation

Desalination

Wave And Tidal Energy 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 Wave And Tidal Energy Market.

Available Customizations:

Global Wave And Tidal Energy 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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