

MARKET INTELLIGENCE REPORT

# The Global Offshore Wind Market 2026

## Pipeline Shape, Procurement Windows and Supply-Chain Gaps

*A data-driven analysis of the Global Offshore Wind Market based on our single-source of the truth Live Project Tracking Platform (see footnote).*

|               |                                                             |
|---------------|-------------------------------------------------------------|
| Prepared by   | Dr Jim Hamill · ExportCentral AI                            |
| Analysis date | 23 July 2026                                                |
| Data snapshot | 18 July 2026                                                |
| Audience      | NE Scotland Tier 2/3 offshore energy supply-chain companies |

## About this report

Based on the extensive AI-supported research undertaken in preparing the prototype version of our Global Offshore Wind Project Tracker, this report presents a detailed overview of the market as of July 2026, quantifying the pipeline, and surfacing the patterns that matter for Tier 2/3 suppliers deciding where to point their business-development efforts.

The datasets analysed cover the following:

| Dataset         | Rows  | What it holds                                         |
|-----------------|-------|-------------------------------------------------------|
| PROJECT_DATA    | 412   | The global project pipeline (the spine of everything) |
| TRACKER_DATA    | 256   | Contracts, tenders & supply-chain opportunities       |
| FORECAST_DATA   | 408   | Tier 2/3 opportunity timeline by work stage           |
| TIMING_WINDOWS  | 1,256 | Package × project × stage procurement windows         |
| BIDDING_DATA    | 48    | Live/upcoming bidding windows with dates              |
| TIMING_FEED     | 62    | Downstream opportunities triggered by Tier 1 awards   |
| RECENT_UPDATES  | 51    | Rolling change log                                    |
| PFDATA          | 47    | Pathfinder buyer contacts / portals (UK, US, FR, DE)  |
| SUPPLIERS_DATA  | 33    | Tier 1 / EPCI directory with Scotland footprint       |
| CROSSINDEX_DATA | 14    | Capability-to-supplier cross-index                    |
| TIMING_PACKAGES | 8     | Lead-time rules per package family                    |
| TIMING_TRIGGERS | 5     | Award-to-downstream trigger logic                     |

## Executive summary

*Five headline findings from the underlying data.*

### 1 • The market is overwhelmingly forward-loaded

Of 310 GW tracked across 412 projects, only 64.6 GW (21%) is operating. 166.8 GW — 2.6× the operating fleet — sits in development or planning, with another 62.6 GW under construction or consented. The offshore wind opportunity is almost entirely ahead of us, not behind. But supply chain action is required now. Delay will almost certainly lead to project exclusion later in the pipeline.

### 2 • A "wall of 2030" dominates the delivery schedule

Stated commissioning dates cluster hard on 2030, where ~65 GW is targeted in a single year — roughly the entire current global operating fleet, again, in twelve months. This is almost certainly optimistic bunching, which itself is the signal: expect slippage, re-phasing and a multi-year procurement surge either side of 2030.

### **3 · Projects are getting dramatically bigger**

Average operating project = 371 MW; average under-construction = 808 MW; average in-development = 1,356 MW. The pipeline's average project is 3.7× the size of today's operating average. Bigger projects mean bigger, more consolidated Tier 1 packages — and higher stakes for Tier 2/3 firms trying to get onto them. Again, delaying action is not an option.

### **4 · Fabrication & steel is the single largest theme**

For the moment, fabrication & steel is the single largest named supply-chain theme, with 59 contract/tender records — ahead of subsea & cables (38), vessels & marine (31) and O&M (26). This is exactly the theme where NE Scotland has real capability, but also real gaps.

### **5 · The supply-chain window is wide open — but coverage is uneven**

The tracker shows 540 procurement windows open right now. Scotland is well represented in logistics, general services, survey/geotech, cables and crew — but with more limited supplier representation in flanges/forgings/machining and in primary steel and coatings.

## 1 · The pipeline: a market defined by what's coming, not what's built

The single most important fact in the dataset is the shape of the pipeline. The operating fleet (64.6 GW, 175 projects) is real, revenue-generating, and mostly in O&M mode. But it is dwarfed by what is planned:

| Status                                | Projects | Capacity | Share of tracked GW |
|---------------------------------------|----------|----------|---------------------|
| Operating                             | 175      | 64.6 GW  | 20.8%               |
| In Development / Planning             | 149      | 166.8 GW | 53.8%               |
| Under Construction                    | 39       | 31.5 GW  | 10.2%               |
| Consented / Approved                  | 32       | 31.1 GW  | 10.0%               |
| Cancelled                             | 13       | 14.6 GW  | 4.7%                |
| Paused / On Hold                      | 2        | 1.5 GW   | 0.5%                |
| Decommissioned / Being decommissioned | 2        | 0.03 GW  | <0.1%               |

The pipeline-to-operating capacity ratio is ~3.6:1. For a supplier, this is the whole thesis in one number — the addressable market for new fabrication, foundations, cables, vessels and installation work is several times larger than the installed base. The risk sits in conversion: 4.7% of tracked capacity is already cancelled, and the two decommissioning entries confirm the front end of the fleet is only just reaching end-of-life. This is a growth market, not a replacement market.

## 2 · The delivery timeline: bracing for the 2030 surge

Plotting capacity by stated commissioning (COD) year reveals a market that has been delivering 3–11 GW/year through 2018–2025, then jumps to a 65 GW spike in 2030 before falling back.

This 2030 wall should be read with care — and that care is the insight. Developers routinely anchor pipeline projects to round-number target years, so 2030 is acting as a magnet for anything not yet firmly scheduled. The practical implications for a Tier 2/3 supplier:

- The real procurement peak comes 2–4 years before COD. Foundations, cables and fabrication for a 2030 project are contracted in 2026–2028. The procurement wave has started. Supply chain companies need to act now.
- Slippage is near-certain. A single-year 65 GW delivery is physically implausible given vessel, port and cable-factory constraints. Expect the 2030 bulge to smear into 2029–2033 — extending the window of opportunity rather than closing it.
- 2035 shows a second bump (12.7 GW) driven by a small number of very large late-decade projects. These are worth monitoring for early-stage positioning.

### 3 · Geography: the UK leads, but the growth is global

| Country        | Projects | Total capacity | Profile                                      |
|----------------|----------|----------------|----------------------------------------------|
| United Kingdom | 102      | 93.5 GW        | Largest operating fleet + deepest pipeline   |
| China          | 80       | 35.5 GW        | High project count, smaller average size     |
| United States  | 26       | 27.9 GW        | Large pipeline, currently policy-constrained |
| Netherlands    | 22       | 22.3 GW        | Dense, fast-moving tender market             |
| Germany        | 35       | 16.8 GW        | Mature market, auctions paused to 2027       |
| South Korea    | 20       | 11.7 GW        | Emerging Asian growth                        |
| Poland         | 11       | 10.1 GW        | New Baltic market scaling fast               |
| Denmark        | 15       | 10.3 GW        | Home of Ørsted/Vestas supply chains          |

*Note: table shows the eight countries with ≥10 GW of tracked capacity. France (13 projects, 6.6 GW) and Ireland fall below that threshold on installed-capacity ranking but appear in Section 8 as priority export markets for NE Scotland Tier 2/3 suppliers on strategic-fit grounds — live CRE AO10 tender pipeline (France) and proximity/policy alignment (Ireland).*

By region, the tracker splits into four roughly comparable blocks — UK & Ireland (98.5 GW), Continental Europe (76.2 GW), Americas & RoW (72.7 GW) and East Asia (59.5 GW) — confirming this is a genuinely global market, not a European one with satellites.

**Strategic reading for NE Scotland:** the UK's dominance is an advantage (home-market proximity, ScotWind/INTOG pipeline) but also a concentration risk. The Continental European markets — Netherlands, Poland, France, Germany — collectively out-scale the UK and are all reachable via the Pathfinder buyer-contact layer now built into the tracker. Export diversification is not aspirational here; it is where more than half the pipeline sits.

### 4 · The technology shift: bigger turbines, deeper water, floating rising

The PROJECT\_DATA technology fields (where recorded) show three structural shifts a supplier must design around:

#### Turbine consolidation

Where an OEM is named, Siemens Gamesa/Siemens (77 projects) and Vestas/MHI Vestas (34) dominate the Western market, with Mingyang, Envision and Shanghai Electric carrying the Chinese fleet. Fewer, larger turbines per project changes the fabrication and installation package structure.

#### Foundations still monopile-led, but floating is now material

Of projects with a recorded foundation, monopiles lead (67), but 52 projects totalling ~49.7 GW are floating — a scale that turns floating from "pilot" into a distinct supply-chain segment (mooring, dynamic cables, anchors, tow-out marshalling). This is directly relevant to Scotland's INTOG/ScotWind floating ambitions.

### Deeper water

Recorded depths run to 800 m with a median of ~23 m — the long tail into deep water is where floating and specialist survey/geotech capability becomes essential.

## 5 · Where the money moves: contracts, tenders & package families

The TRACKER\_DATA table (256 records — 111 contracts, 76 supply-chain opportunities, 46 tenders) is the closest thing to a live deal-flow feed. Excluding "All/Multiple" records, the package-family breakdown is unambiguous:

| Package family                            | Records | Signal for Tier 2/3                                                            |
|-------------------------------------------|---------|--------------------------------------------------------------------------------|
| <b>Fabrication &amp; Steel</b>            | 59      | The largest single theme — primary/secondary steel, jackets, transition pieces |
| <b>Subsea, Cables &amp; Survey</b>        | 38      | Array/export cables, protection, geotech                                       |
| <b>Vessels &amp; Marine Services</b>      | 31      | CTV/SOV, installation, cable-lay                                               |
| <b>O&amp;M, Inspection &amp; Services</b> | 26      | Recurring revenue as fleet grows                                               |

Across the 256 records, 254 (99%) are flagged as Tier 2/3-relevant — confirming the tracker is purpose-built for this audience. Of contracts with a parseable value, the awarded total exceeds £84 bn — and that is only the disclosed subset, so the true contracted value is materially higher.

**Data-scientist caveat:** the status field is highly free-text (100+ distinct values), which is excellent for human context but means status must be categorised before it can be counted. Grouped, it resolves to ~48 awarded, ~40 active, ~14 future-pipeline — a healthy live/awarded balance indicating an active, not stalled, market.

## 6 · Timing: when the work actually opens

The TIMING\_WINDOWS table (1,256 rows) is the tracker's most granular asset — every package × project × stage combination, classified by whether the window is open. The headline:

- **540 windows** are "open now" — live, addressable procurement opportunities across the global pipeline.
- **518** are "likely awarded" (useful for tracking who won, and for downstream Tier 3 opportunities).
- **174** are "upcoming" — the forward book to position against.

- **24** are "on hold — re-auction" — the Japan Round 1 sites (Yurihonjo, Noshiro/Mitane/Oga, Choshi) after Mitsubishi's withdrawal, a reminder that even awarded work can reopen.
- **184** of the 1,256 windows (15%) are flagged Scotland-relevant — a concrete, filterable target list rather than a vague "there's opportunity out there."

On near-term urgency, BIDDING\_DATA shows five formal windows closing within 90 days, led by the UK's Allocation Round 8 CfD and a cluster of French tenders (AO9, AO10, Bretagne Sud 2 floating). These should be considered as immediate diary items.

## 7 · Scotland's supply-chain position: strengths and the gaps to attack

Cross-referencing CROSSINDEX\_DATA (capability → supplier counts) is where this report becomes actionable. Of 33 tracked Tier 1/supplier entries, 20 have a Scotland footprint — but coverage is very uneven by capability:

### Where Scotland is well positioned

- Survey, geotech & site data — 3/3 (100%)
- Cable systems & protection — 3/4 (75%)
- Crew, personnel & vessel services — 6/8 (75%)
- General goods & services — 16/24 (67%) and Logistics & marshalling — 14/25 (56%)
- NDT, inspection & testing — 6/10 (60%)

### Where Scotland is exposed

- **Flanges, forgings & machining — 0/4 (0%)** — a complete gap in a fabrication-led market
- Coatings & corrosion protection — 3/11 (27%)
- Steel plate & primary steel — 3/10 (30%)
- Secondary steel & fabrication — 3/9 (33%)

#### Data-scientist reading

Scotland's strength is concentrated in services and enabling activities (logistics, crew, survey, inspection) — valuable but often lower-margin and more contestable. The gaps sit squarely in the highest-volume package family (fabrication & steel). That is the strategic tension: the biggest theme in the market is the one where local supply is thinnest.

For a BD consultant, this points to two plays — (1) help existing Scottish steel/fabrication firms get visible in these registries and onto Tier 1 vendor lists, and (2) build consortia that pair Scotland's strong service capability with imported fabrication capacity.

## 8 · Access layer: who to call

The newly-expanded PFDATA (47 rows) gives the market a "who-to-call" layer across four jurisdictions: 12 active tenders, 24 named buyer contacts, and 11 developer procurement portals spanning the UK (NSTA Energy Pathfinder), US (BOEM + East Coast developers), France (CRE + developers) and Germany (BNetzA/BSH + developers). This converts the pipeline analysis above into named routes to market — the missing link between "here's the opportunity" and "here's the person to approach."

## 9 · Strategic implications for a NE Scotland Tier 2/3 supplier

- **Sell to the pipeline, not the fleet.** 79% of tracked capacity is pre-operational. BD effort should track development-stage projects and their 2026–2028 procurement waves, not chase O&M on the existing fleet alone.
- **Position for the pre-2030 procurement surge now.** The work behind the 2030 wall is being contracted this year and next. Waiting for 2030 means missing it.
- **Close the fabrication gap deliberately.** The market's largest theme is Scotland's weakest coverage. This is the highest-leverage strategic target — through visibility, accreditation and consortia.
- **Diversify beyond the UK.** More than half the pipeline is outside the UK, and the Pathfinder layer now provides named contacts in the US, France and Germany. Netherlands, Poland and Denmark are the strongest near-term export adjacencies.
- **Ride the floating-wind emergence.** ~50 GW of floating pipeline creates entirely new package families (mooring, dynamic cables, anchors, tow-out) that play to Scotland's marine and INTOG/ScotWind positioning.
- **Use the 540 open windows as a live target list.** Filter for the 184 Scotland-relevant windows and the 5 tenders closing within 90 days for immediate action.

A key task should be to match your company's core capabilities benchmarked against the timescale of 41 different work packages over the six-stage lifecycle of a typical offshore wind project. By creating a work package timescale and pipeline, this will support your business development planning for offshore wind.

## 10 · Data-quality notes

*A responsible analyst flags the limitations of the underlying data:*

- COD years are stated targets, not commitments. The 2030 spike reflects developer optimism/bunching; treat annual delivery figures as directional.
- The status field is free-text in TRACKER\_DATA (100+ variants) — it must be grouped before counting; the categorised figures above reflect that grouping.
- Technology fields are sparsely populated — foundation type is recorded for ~48% of projects and OEM for ~47%. Technology percentages describe the recorded subset, not the full 412.
- Contract values are partial — only ~32 awarded contracts carry a parseable value; the £84 bn total is a floor, not a ceiling.
- Coverage is deepest for the UK and Europe, reflecting the tracker's audience; East Asian and RoW projects are tracked at pipeline level with less supply-chain granularity.



None of these undermine the headline findings — the pipeline shape, the 2030 concentration, the fabrication-theme dominance and the Scotland capability gaps are all robust to these caveats.

A follow-up paper will present a more detailed discussion of the strategic implications of the report for offshore energy supply chain companies.

---

***Source:** All figures and charts are from our prototype Global Offshore Wind Project Tracker, data snapshot 18 July 2026. Analysis: 23 July 2026.*

***About the Tracker:** At prototype development stage, our Global Offshore Wind Project Tracker is a live, single source of the truth intelligence platform covering ~412 offshore wind projects worldwide plus ~48 tender, buyer-notice and procurement-portal entries — built specifically for NE Scotland Tier 2/3 supply-chain companies to spot bid-ready opportunities, track lifecycle changes (FIDs, construction starts, commissioning, cancellations), monitor live tenders across the UK, Europe, Americas and APAC, and identify named procurement contacts and developer supplier portals. It refreshes weekly via a Sunday-morning detect-only scan that flags changes for review before anything is published to the live site.*

*Please do not hesitate to contact me if you would like to discuss what the Live Tracker can do for your business.*

**[Dr Jim Hamill](#)**

**You can access our comprehensive list of offshore low-carbon energy Market Intelligence Reports and Weekly Briefings here – [ExportCentral AI](#)**