

Global Offshore Wind Monopile Foundation Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 6.8 bn
Forecast (2031)	USD 12.9 bn
CAGR (2021-2031)	11.1%
Study period	2021-2031
Largest region	Asia-Pacific · 46.8%
Fastest-growing region	Asia-Pacific · 12.4%
Market concentration	Moderate
Licence	Individual / Company

The global offshore wind monopile foundation market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, advancing at an XX% CAGR. Demand is shifting toward extra-large monopiles exceeding 10 metres in diameter as 14 MW and larger turbines move into commercial deployment. Asia-Pacific accounted for XX% of 2025 market value, while European investment in expanded rolling, welding and quayside capacity is strengthening the merchant supply base. Project repricing, installation-vessel availability, steel intensity and auction design will determine which suppliers convert the expanding offshore wind pipeline into profitable orders.

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Executive summary

The global offshore wind monopile foundation market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, advancing at an XX% CAGR. Demand is shifting toward extra-large monopiles exceeding 10 metres in diameter as 14 MW and larger turbines move into commercial deployment. Asia-Pacific accounted for XX% of 2025 market value, while European investment in expanded rolling, welding and quayside capacity is strengthening the merchant supply base. Project repricing, installation-vessel availability, steel intensity and auction design will determine which suppliers convert the expanding offshore wind pipeline into profitable orders.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global operating offshore wind capacity reached 92.5 GW at the end of 2025 after 9.3 GW was grid-connected during the year, according to the Global Wind Energy Council.
- China commissioned 6.6 GW of offshore wind capacity in 2025 and remained the largest source of annual foundation demand.
- The five largest offshore wind markets represented XX% of global installed capacity at the end of 2025, according to the Global Wind Energy Council.
- The average offshore turbine installed during 2025 reached 10.3 MW, raising foundation diameter, plate-thickness and lifting requirements.
- The US Department of Energy recorded XXX.3 MW of operating offshore wind capacity on monopile foundations in 2022, making monopiles the leading global substructure.
- Europe installed 171 offshore foundations during the first half of 2025, according to WindEurope, although only 741 MW of new capacity was grid-connected in that period.
- Monopiles exceeding 10 metres in diameter represented XX% of 2025 market value and will expand at a XX% CAGR through 2031.
- TP-less designs accounted for XX% of 2025 market value and are gaining share by reducing offshore lifts, interfaces and installation time.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Offshore Wind Monopile Foundation Market Trends and Growth Drivers

The market is entering a scale-up phase in which foundation geometry matters as much as installed offshore capacity. Larger turbines reduce the number of foundations required per gigawatt, but each unit consumes substantially more steel, factory time, welding consumables and quayside capacity. This creates value growth ahead of unit growth and concentrates opportunity among plants capable of serial extra-large production.

Demand visibility remains uneven because monopile orders follow final investment decisions rather than headline national targets. Auction design, grid access, financing costs and turbine-bankability determine when projects enter fabrication, while factory slots must often be reserved several years before installation. Suppliers therefore compete on schedule credibility and balance-sheet capacity as well as fabrication price.

Industrial policy is becoming a direct commercial variable. European resilience criteria, UK supply-chain commitments, US domestic-content incentives and Asian localization rules alter the feasible sourcing set for each project. Traceable low-carbon steel, regional production and integrated logistics are moving from differentiators toward contract requirements.

Growth drivers

Fixed-bottom offshore wind build-out

Government auction schedules and utility procurement plans are converting seabed pipelines into multi-gigawatt construction programmes. Each fixed-bottom project creates concentrated demand for serially manufactured foundations, allowing qualified suppliers to secure multi-year production visibility.

Larger offshore wind turbines

Turbines in the 14 MW to 20 MW class require wider, heavier monopiles with thicker plate and more demanding fatigue performance. The resulting increase in tonnes and fabrication hours per unit raises foundation-market value even as fewer turbines are required for each gigawatt.

Extended monopile operating envelope

Improved soil modelling, installation analysis and large-diameter piling equipment are extending monopile applicability toward water depths above 50 metres. Developers retain the technology where feasible because its single-leg architecture supports repeatable fabrication and comparatively rapid installation.

Strategic manufacturing expansion

New and expanded plants in Rotterdam, Bilbao, Teesside, Poland and East Asia are adding large-diameter rolling lines, automated welding and heavy quayside capacity. The investment removes a key supply constraint and enables serial output of monopiles weighing more than XXX tonnes.

TP-less foundation adoption

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Integrated monopile-to-tower interfaces eliminate separate transition-piece fabrication and installation while reducing offshore lifts. The design favors suppliers that can deliver tighter flange tolerances, complete secondary steel and installation-ready foundations.

Energy-security investment

European and Asian governments are treating offshore wind as domestic generation infrastructure that reduces exposure to imported fuels. Longer-term capacity ranges and coordinated North Sea development improve demand visibility for steel mills, fabricators and ports.

Restraints

Project repricing and auction gaps

Higher financing, turbine and installation costs have weakened projects awarded under earlier power-price assumptions. Delayed final investment decisions interrupt factory loading, while failed auctions shift demand between years and increase working-capital exposure.

Heavy-plate and energy-cost exposure

Steel represents the dominant material input and must meet demanding weldability, fatigue and traceability requirements. Volatile plate, electricity and alloy costs compress margins where supply contracts lack timely indexation.

Installation and port bottlenecks

Extra-large foundations require deepwater quays, high bearing capacity, specialized transport systems and next-generation installation vessels. A delay in any element can force storage, resequencing or slower factory output despite completed fabrication.

Environmental piling constraints

Underwater-noise thresholds, marine-mammal protections and seasonal installation windows add mitigation equipment and scheduling constraints. Larger diameters increase the importance of noise-reduction systems, alternative installation techniques and early consenting work.

Substructure substitution

Jackets gain competitiveness at greater water depths, difficult soil conditions and sites where piling-noise constraints are acute, while floating systems address deepwater resources. This limits the share of monopiles in several emerging offshore basins.

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Driver and Restraint Impact on the Offshore Wind Monopile Foundation Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Fixed-bottom offshore wind build-out	XXX	XXX	XXX
Larger offshore wind turbines	XXX	XXX	XXX
Extended monopile operating envelope	XXX	XXX	XXX
Strategic manufacturing expansion	XXX	XXX	XXX
TP-less foundation adoption	XXX	XXX	XXX
Energy-security investment	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Project repricing and auction gaps	XXX	XXX	XXX
Heavy-plate and energy-cost exposure	XXX	XXX	XXX
Installation and port bottlenecks	XXX	XXX	XXX
Environmental piling constraints	XXX	XXX	XXX
Substructure substitution	XXX	XXX	XXX

Source: XXX

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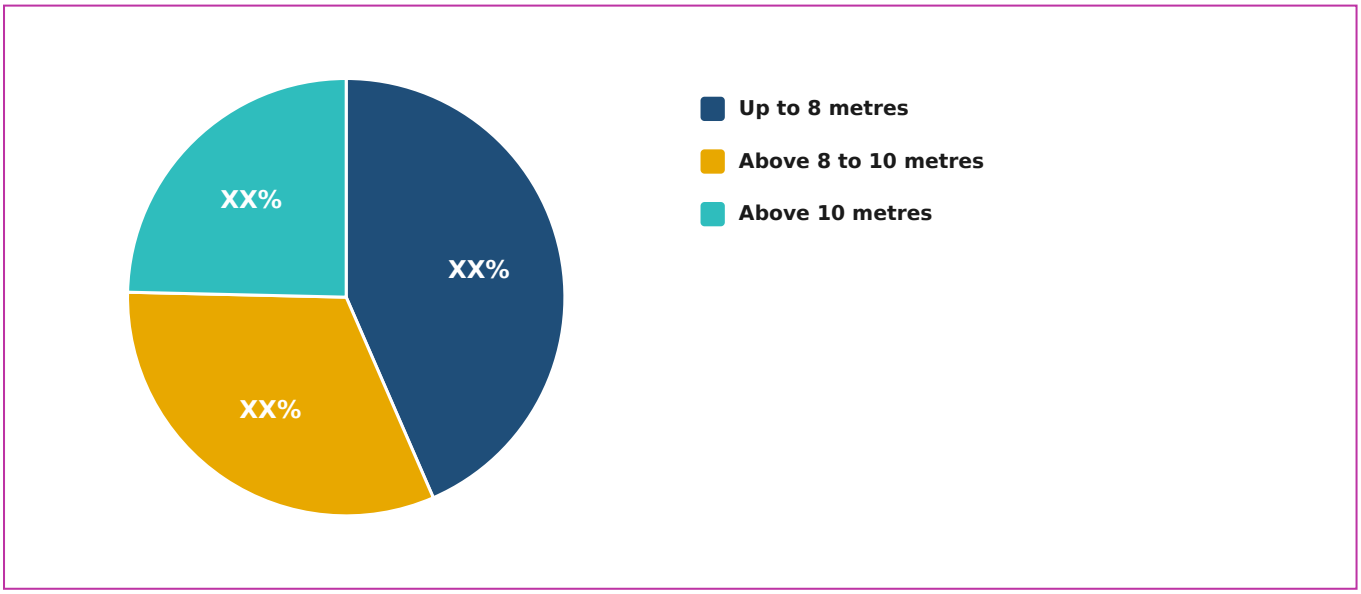
Offshore Wind Monopile Foundation Market Segmentation Analysis

By Monopile Diameter

The 8-to-10-metre class remains the market's largest segment because it supports the installed base of 8 MW to 14 MW turbine programmes. Above-10-metre monopiles are gaining rapidly as projects adopt 14 MW-plus machines and move into deeper water. The segment's higher tonnage, thicker plate and welding content amplify revenue per foundation.

Value share by monopile Diameter, 2025



Source: XXX

Value by monopile Diameter, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Up to 8 metres	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 8 to 10 metres	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 10 metres	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Turbine Rating

The 12 MW to 15 MW class led the market as North Sea and Chinese projects standardized around larger turbine platforms. Foundations for turbines above 15 MW will expand fastest through 2031, supported by commercial deployment of 15 MW to 20 MW machines. Lower-rating categories remain important in Japan, Taiwan and projects using proven turbine configurations.

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Value by turbine Rating, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Up to 8 MW	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 8 MW to 12 MW	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 12 MW to 15 MW	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 15 MW	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Water Depth

The 30-to-50-metre segment combines broad North Sea applicability with established installation practice and therefore remains dominant. Improved structural design and installation equipment are extending monopiles beyond 50 metres where soil conditions permit. The deepest segment grows fastest but faces stronger competition from jackets and floating foundations.

Value by water Depth, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Up to 30 metres	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 30 to 50 metres	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 50 metres	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Foundation Interface

Conventional monopile-plus-transition-piece systems retain a large installed base, multiple qualified suppliers and familiar offshore procedures. TP-less foundations are gaining share as developers reduce component count and offshore lifts. Growth requires tighter flange alignment, integrated secondary steel and close coordination between foundation and tower engineering.

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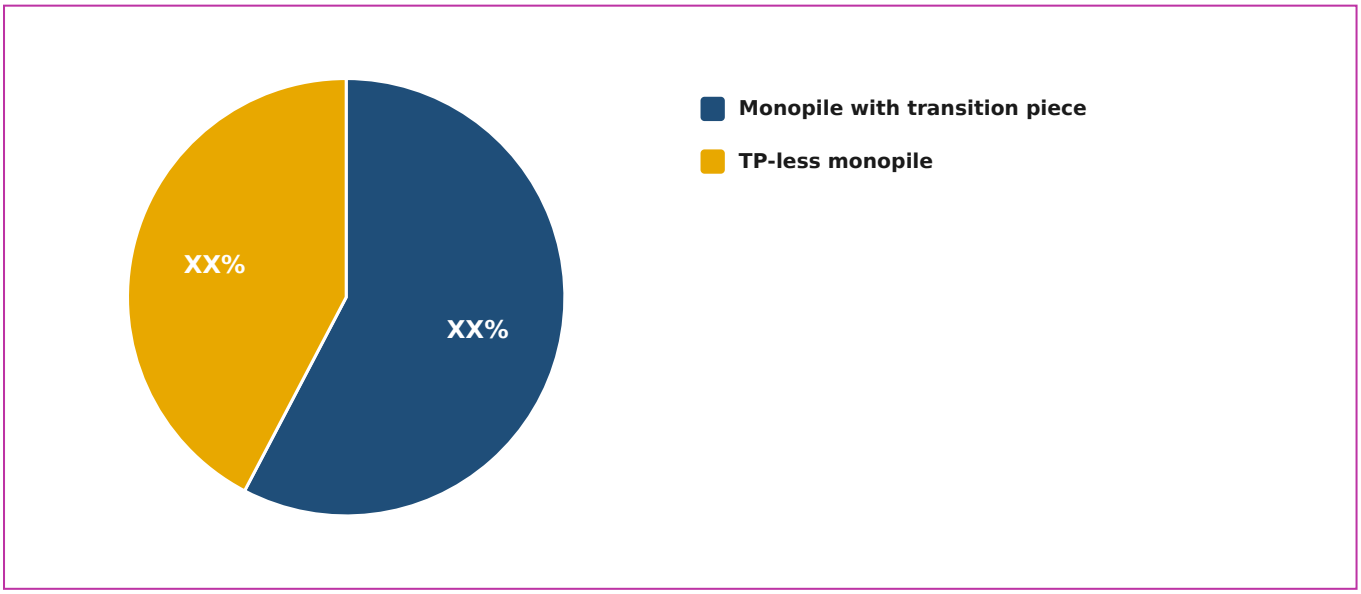
Value share by foundation Interface, 2025



Source: XXX

Value by foundation Interface, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Monopile with transition piece	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
TP-less monopile	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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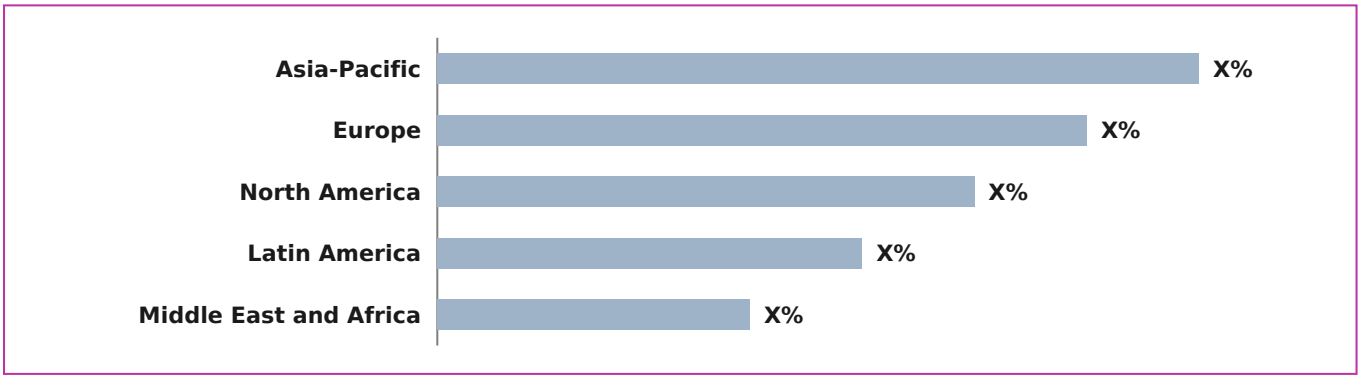
Offshore Wind Monopile Foundation Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global market value in 2025, supported by China's large domestic installation programme and an increasingly capable regional steel-fabrication ecosystem. China combines turbine manufacturing, plate supply, coastal yards and installation assets at a scale unmatched elsewhere, while Taiwan, South Korea and Japan provide higher-value openings for internationally qualified suppliers. Regional revenue is forecast to grow at XX% annually through 2031 as larger turbines raise steel tonnage per foundation.

Europe accounted for XX% of 2025 revenue and remains the core merchant market for extra-large monopiles. The United Kingdom, Germany, the Netherlands, Poland and Denmark support a visible North Sea and Baltic pipeline, while investments by Sif, EEW, Haizea, CS Wind Offshore and SeAH Wind are expanding capacity. EU resilience and sustainability criteria will increasingly reward traceable European production, low-carbon materials and dependable delivery.

North America represented XX% of 2025 value, with Coastal Virginia Offshore Wind and Empire Wind supporting industrial learning and transatlantic foundation flows. The region retains a substantial long-term resource base, but permitting disputes, federal policy volatility and uneven project economics create a stop-start order profile. Latin America and the Middle East and Africa remain pre-commercial markets through most of the forecast, with Brazil providing the strongest post-2028 fixed-bottom opportunity.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Offshore Wind Monopile Foundation Market Competitive Landscape and Company Share

The market is moderately concentrated: the eight leading fabricators controlled XX% of 2025 revenue, but the structure differs sharply by region. EEW Special Pipe Constructions and Sif Group anchor the European merchant market, while Dajin Heavy Industry, Jiangsu Haili Wind Power Equipment Technology, Titan Wind Energy and other Chinese groups serve a large domestic base and increasingly pursue exports.

Competitive advantage is shifting from conventional tubular fabrication toward extra-large rolling capability, automated longitudinal and circumferential welding, serial quality assurance and direct deepwater load-out. Sif's expanded Maasvlakte facility targets annual output equivalent to approximately 200 reference XXXL monopiles, while Haizea Bilbao, SeAH Wind's Teesside plant and CS Wind Offshore's European footprint add new contestable capacity.

The strategic direction is toward earlier supplier involvement, capacity-reservation agreements, low-carbon steel options and bundled secondary-steel or marshalling services. Consolidation has increased through transactions such as CS Wind's acquisition of Bladt Industries, while developers are using dual sourcing and local-content structures to reduce delivery and political risk.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
EEW Special Pipe Constructions GmbH	XXX	XXX	XXX	XXX
Sif Holding N.V.	XXX	XXX	XXX	XXX
Dajin Heavy Industry Co., Ltd.	XXX	XXX	XXX	XXX
Jiangsu Haili Wind Power Equipment Technology Co., Ltd.	XXX	XXX	XXX	XXX
Titan Wind Energy (Suzhou) Co., Ltd.	XXX	XXX	XXX	XXX
CS Wind Offshore A/S	XXX	XXX	XXX	XXX
Steelwind Nordenham GmbH	XXX	XXX	XXX	XXX
Haizea Wind Group	XXX	XXX	XXX	XXX
SeAH Wind Ltd.	XXX	XXX	XXX	XXX
Century Wind Power Co., Ltd.	XXX	XXX	XXX	XXX

Source: XXX

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Offshore Wind Monopile Foundation Market Forecast and Opportunities

Market value will rise from USD XXX billion in 2025 to USD XXX billion in 2031. Growth will be led by foundation mass and technical content rather than unit count alone: turbines above 15 MW reduce the number of positions per gigawatt but require substantially larger diameters, heavier plate and more intensive welding.

The central forecast assumes that delayed European projects are repriced and recycled into auctions, China maintains a large annual installation programme, and Northeast Asian markets progress from demonstration arrays to commercial-scale construction. A stronger scenario emerges if grid connections and permitting accelerate; the downside is concentrated in renewed auction undersubscription, vessel shortages and prolonged financing pressure.

Winning suppliers will secure indexed steel arrangements, demonstrate repeatable extra-large production and align factory slots with bankable project schedules. Plants that combine automated fabrication with unrestricted quayside logistics and documented embedded-carbon performance will command the strongest utilization and contracting position.

Opportunities

- Monopiles above 10 metres in diameter for 15 MW-plus turbines
- Low-carbon steel and traceable embedded-emissions offerings
- Localized manufacturing in the United States, Poland, South Korea and Taiwan
- TP-less foundations and bolted or slip-joint tower interfaces
- Automated welding, digital quality control and robotic coating inspection
- Integrated fabrication, marshalling and project-logistics contracts
- Secondary-steel standardization and modular internal platforms

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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