ENERGY INDUSTRIES COUNCIL

EIC INSIGHT REPORT

UK & Europe Offshore Wind

August 2025

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Executive summary

Offshore wind has taken some of the biggest strides in Europe when looking at ambitions, policies, capacity growth and innovation. However, its maturity and expertise in the technology has also resulted in the region enduring most of the brunt from the global challenges seen within the industry.

Over the last five years, Europe have seen a decrease in the number of new farms coming into production. This did see a significant improvement in 2023, with nine new farms being commissioned with a combined capacity of 3.3GW. In 2022, only five new farms were commissioned, but a huge 3.7 GW was brought online thanks to the completion of Hornsea Two off the coast of the UK. In the last 12 months, we have seen six new farms commissioned with a combined capacity of 2.7 GW.

When looking beyond the operational pipeline, Europe has over 411 GW in Europe across 386 projects, with the region responsible for majority of the future additions globally (41%) when excluding China. Growth has been driven by the strength of its mature markets continuing to further bolster pipelines into the next decade, whilst also being home to several emerging markets looking to install their first turbines and launch first ever auctions. UK leads in capacity additions up to 2035 with Germany, Sweden, Netherlands and Poland following. Floating offshore wind also represents a sizable proportion of the pipeline (~37%)

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with the technology looking to move towards commercialisation by the early 2030s. GW-sized projects are being proposed globally with the UK again leading the way. The mediterranean and southern regions of Europe are also expected to dominate the floating industry in the long term.

However, the last few years have seen setbacks in the region, making offshore wind an uncertain opportunity for the supply chain. Macroeconomic headwinds tied with supply chain pressures, political uncertainty, permitting speeds, grid readiness and narrative disinformation, started to impact pipelines and investor confidence in 2025. Developers have started to delay/shelve projects, with others moving out of certain markets and no longer participating in auctions. OEM contractors have also started retreating to recover costs where possible, all of which have left a lack of clarity on how the industry will progress – and when. However, 2025 has also been the year for Europe to start addressing these challenges through policy reform, auction/framework re-designs and long-term planning. The mature markets continue to face its fair share of setbacks, but are starting to pave the path for modified approaches, whilst also allowing emerging markets to course-correct earlier on.

Europe is home to many of the world's major OEMS with the likes of Siemens Gamesa, Vestas, Nordex and GE Vernova all present in the region. Each country in Europe contributes different strengths which has allowed Europe to have a vertically integrated offshore wind supply chain. While Europe has all the capabilities within the supply chain there are still bottlenecks and crunches coming from lack of capacity for components, long lead times, vessel shortages and a growing concern that port infrastructure across the region is not fit for purpose for the growing pipeline of projects that have been announced.

Looking further ahead the supply chain within Europe must contend with the growing competition from Chinese suppliers looking to get their foot in the door within the European market. Financial schemes and measures aim to bolster the manufacturing and port potential that Europe has at its doorstep to create a sustaining offshore wind supply chain fit for the future.

The report focusses in detail on the region's notable markets - UK, Germany, Netherlands, Denmark, Belgium Norway, Poland, France and Spain - assessing its operational and proposed pipelines alongside its key drivers, challenges, future outlook for reform and growth, and "end-of-life" prospects. The report also offers an analysis of the top tiers of the offshore wind supply chain capabilities for same key markets in Europe. The analysis was based on 10 key equipment and service segments, including nacelles, blades, towers, foundations, mooring systems, array and export cables, installation services, offshore and onshore substations components, and operations & maintenance (O&M). Other supply chain research such as local content rules and port infrastructure was also analysed for further understanding.

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