EIC INSIGHT REPORT

US Offshore Wind

November 2025

US Offshore Wind

Insight Report

November • 2025

Executive summary

The United States offshore wind landscape has shifted significantly throughout 2025. Under the previous administration, the sector advanced ambitious targets and strong policy commitments, yet it was already grappling with challenges seen across the global industry – including bottlenecks, rising costs, and overall delays. The new administration not only shifted energy priorities away from offshore wind but actively sought to dismantle the sector. Regulatory reversals, project cancellations, reduced federal funding and stop-work orders have pushed the industry into its most difficult moment to date, creating an uncertainty that is likely to persist in the coming years.

The development pipeline has contracted considerably, falling from a planned 56 GW to 25.4 GW as projects stalled or were halted during this period. This reflects a climate of uncertainty rather than a complete structural collapse. Some projects on pause could return if market and policy conditions improve – however, this remains a possibility rather than an expectation.

Throughout 2025, the industry saw continued delays and escalating regulatory disruption. Beyond the One Big Beautiful Bill Act (OBBBA), auction postponements, the withdrawal of previously designated wind areas, and stop-work orders on nearly completed projects deepened the sense of instability. As a result, several developments were

cancelled and some developers stepped back from the market – at least for the time being.

The supply chain has also been affected by the OBBBA provisions and tariff measures, which have constrained financing for manufacturing facilities, increased domestic content quotas, and raised costs on imports for equipment heavily reliant. Nevertheless, suppliers remain optimistic about the long-term prospects of the US offshore wind market. In the short term, many are able to diversify their operations by delivering into offshore Oil and Gas projects or supplying to emerging markets, such as Canada.

Despite the challenging federal environment, the country retains areas of resilience. The supply chain's flexibility to focus on other markets while waiting for momentum to recover, along with early planning for floating offshore wind – notably in California – signals that some states remain committed to the sector for the foreseeable future. This suggests that offshore wind in the U.S. is not finished, but rather in a period of strategic pause as stakeholders assess whether momentum can eventually return.

This study provides a comprehensive assessment of market dynamics, opportunities and supply chain capabilities across North America, while also evaluating the hurdles now confronting the industry. Policy uncertainty stands out as the most pressing challenge, shaping expectations for the long-term outlook and the pace at which the industry may recover.

Get the complete Insight Report

EIC members can download the full report via EICDataStream

Not an EIC member?
To buy a copy of the report, please contact **Neil Golding**, Director, Market Intelligence
Email: neil.golding@the-eic.com