



WFO

Global Offshore Wind Report

MARCH 2026

2025

About WFO

WFO is the world's leading business platform for the offshore wind industry. By connecting and supporting our members and the global offshore wind community, WFO is helping to make offshore wind one of the world's leading sources of renewable energy.

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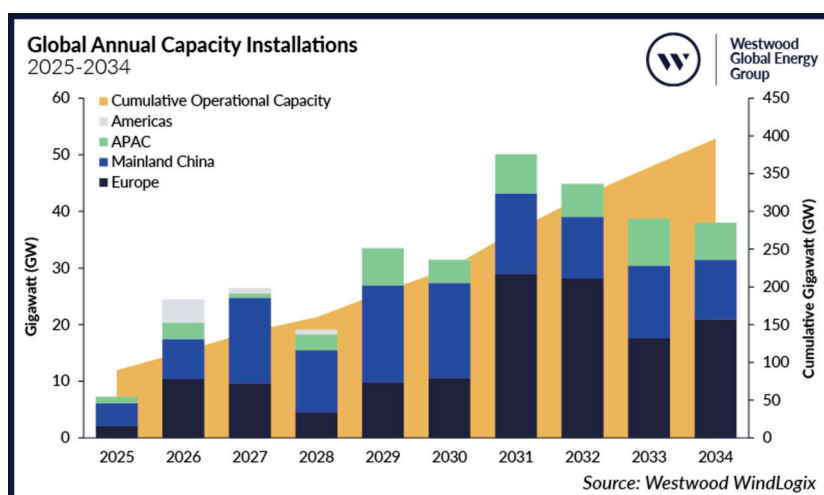


Global Offshore Wind Outlook

The offshore wind sector faced a slowdown in 2025 resulting in a reduction in capacity additions, final investment decisions (FID) and lease awards in comparison to the previous year. Despite this, 30GW of lease capacity was awarded. This slowdown has been recognised by governments, leading to policy resets in 2025 aimed at ensuring delivery of the current project pipeline and securing a more resilient pipeline for the years ahead.

As governments refine leasing frameworks and adjust auction terms to restore developer confidence, 2026 is expected to follow a softer year for leasing activity, after 2025 saw a sharp reduction in awards as several tenders attracted no bids or were delayed for redesign. Nonetheless, over 30GW of capacity was awarded in 2025, with fixed bottom projects accounting for 80% of this and the remaining 20% coming from floating wind sites.

- Major lease capacity that was awarded in 2025 included 4.5GW of capacity in the UK via the Celtic Sea floating wind auction and 1.5GW in France for the rights to develop the Centre Manche II wind farm. Colombia also concluded its first offshore wind auction, with an option awarded for a 425MW site.
- The muted industry response to tenders in 2025 has resulted in governments to reset and re-think their offers in auctions, with some countries either pausing tenders or rescheduling timelines. Due to this, Westwood expects a reduction in leasing activity in 2026, with an uptick in 2027.
- Contributions for 2026 lease awards are expected to come from Taiwan via the Round 3.3 auction, the AO9 tender in France as well as North Sea Central and Hesselo auctions in Denmark. Aside from these incumbent markets, new markets such as Canada are anticipated to contribute to 2026 awards via Nova Scotia's first auction.
- 2025 served as a turning point for many offshore wind markets, prompting governments to reassess how their leasing frameworks support long-term sector growth. As policymakers refine auction structures and pricing mechanisms, 2026 is set to be a transitional year before momentum strengthens again in 2027.
- Looking ahead, the pipeline continues to build, supported by mature markets preparing new rounds and emerging regions progressing their first competitive processes. While the near-term outlook is softer, the broader trajectory for offshore wind leasing remains firmly upward.



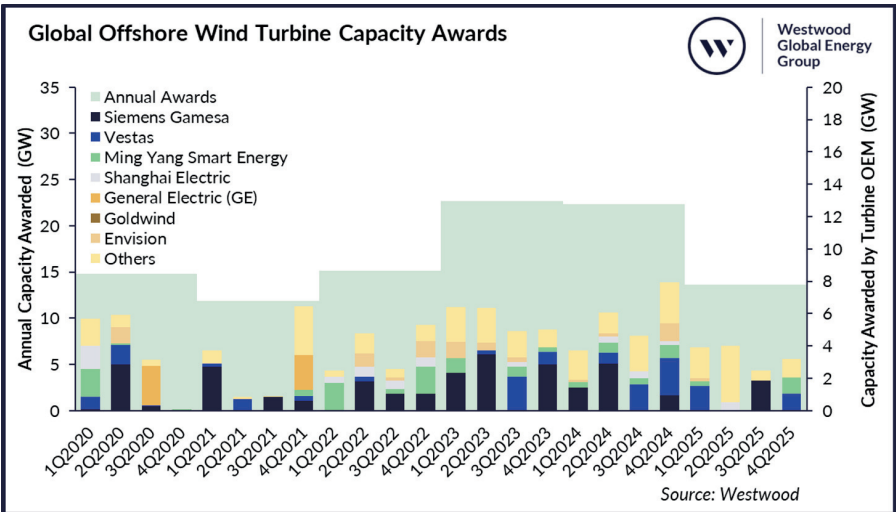
Cumulative global offshore wind capacity is forecast to reach 396.2GW by 2034, with Europe accounting for 45% of this capacity.

- By 2034, operational capacity is expected to reach 396.2GW. Fixed-bottom developments will account for the majority of projected additions (96%), while commercial floating wind projects will contribute the remaining 4%.
- Despite the slowdown in 2025, activity will be on the rise in 2026, with a total of 24.5GW of capacity expected to come online.
- FID activity also reduced in 2025, in comparison to 2024, with FIDs being taken on 12.2GW of projects. However, this is also expected to increase, with 2026 FIDs forecast to reach 22.3GW.

Global Offshore Wind Turbine OEM Market Share

13.6GW worth of turbine contracts were awarded in 2025, with Vestas leading in terms of turbine orders, accounting for 19% of the total, a stark change from the previous year which saw Siemens Gamesa taking the top position.

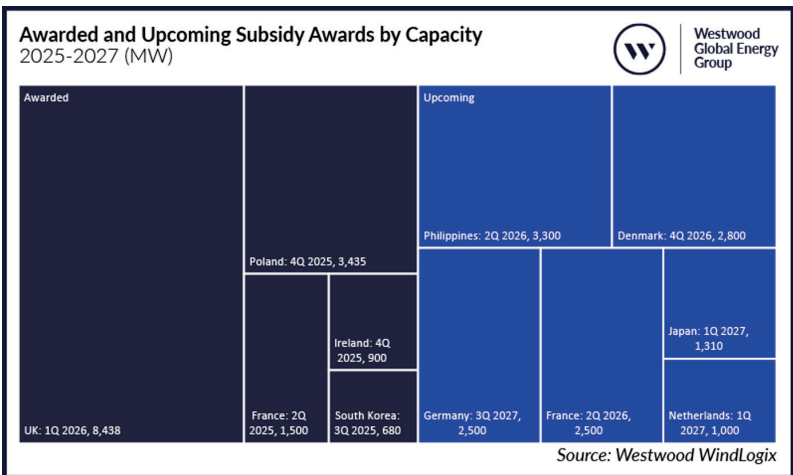
- Vestas led in terms of overall turbine awards for the year, with key contract wins coming from the Nordlicht wind farms in Germany, Fengmiao Phase I in Taiwan and Shinan Ui in South Korea. All these wind farms will feature the V236-15MW turbine model.
- Siemens Gamesa and Ming Yang Smart Energy (MYSE) came in second (1.9GW) and third (1.3GW) respectively.
- In the overall period of 2020-25, Siemens Gamesa continues to lead with a 27% market share (based on total awarded capacity), followed by Vestas (14%) and MYSE (11%).
- There was no slowdown in the development of larger turbines by Mainland Chinese OEMs, with announcements coming from several companies regarding plans for turbines with ratings of over 25MW. In addition to this, Dongfang Electric completed the installation and grid connection of a 26MW turbine at the Dongying offshore wind equipment testing base.
- Siemens Gamesa also completed the construction of its 21.5MW prototype offshore wind turbine, and it is now being tested at the Osterild test centre in Denmark.



Key Theme: Record Transactions

Over the past 18 months, many countries have seen offshore wind subsidy and lease auctions fail. While the details differ, the reasons are consistent: rising costs, market uncertainty and, above all, insufficient government support not matching this changed environment.

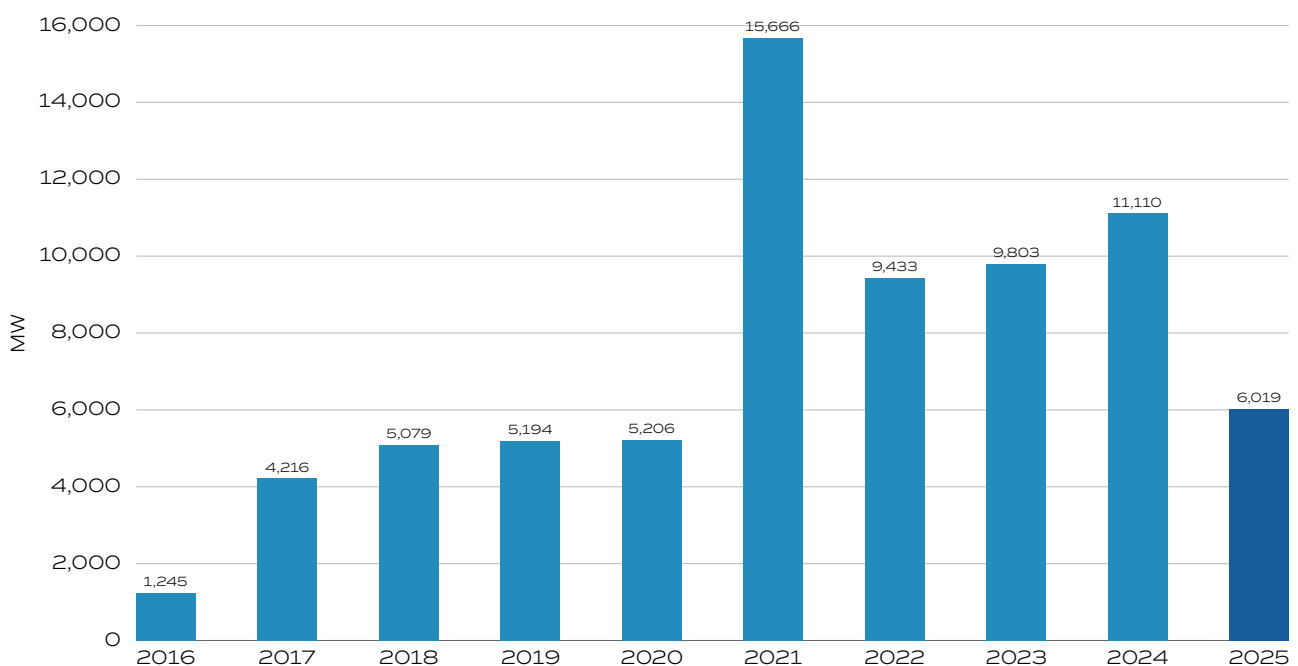
- In 2025, governments recognised this issue and began shifting policies, with budgets being increased in some countries, whilst others moved away from the ‘zero-subsidy’ approach, ushering in a return of subsidy schemes.
- In the UK, the government raised the strike price and sharply increased the funding available for its annual CfD auctions following the failure of the 2023 round, enabling 8.4GW of capacity to be secured in Allocation Round 7 at the beginning of 2026. Using newly granted powers, it doubled the budget mid-round from GBP900mn to nearly GBP1.8bn, which was instrumental in unlocking this record level of awards.
- Poland completed its first competitive offshore wind CfD auction at the end of 2025, awarding contracts to three projects with a combined capacity of 3.4GW. Ahead of the auction, the Polish government moved swiftly to address rising cost pressures in the sector by raising the planned maximum strike price from around PLN471.83/MWh to up to PLN512.32/MWh to account for rising project costs and ensure bidder interest. The auction was seen as a success during a year in which the sector faced strong headwinds, with all three projects coming in below the ministerial maximum price caps.
- Countries such as Denmark and the Netherlands, which had been pursuing the development of offshore wind projects without subsidies, have reversed course after receiving zero bids in recent auctions and are now committing to auctions that include a subsidy. The two countries are now aiming to award 2.8GW (Denmark) and 1GW (Netherlands) of lease areas with a subsidy in 2026/2027, and future auctions are expected to follow a subsidy-based model.
- Germany is also expected to follow this shift, after cancelling the planned 2026 re-tender of two sites that attracted no bidders in 2025, with the expectation that future auctions will include subsidies.
- This reset is not limited to Europe, as Taiwan and Japan are also revising their offshore wind auction frameworks. Taiwan’s draft Round 3.3 framework plans to avoid zero-dollar bids and introduce a minimum purchase price as a supplementary measure for surplus power beyond CPPA volumes. In Japan, the government plans to run a Round1 re tender in early 2026 followed by the Round4 auction, alongside reforms including the introduction of bid floor and ceiling prices and a shift in scoring criteria to prioritise feasibility over delivery speed.



Global Offshore Wind Growth

Global growth decreases compared to 2024

Annually Added Offshore Wind Capacity



A total of 6 GW of global offshore wind capacity was added in 2025.

New capacity in 2025 decreased in comparison to 2024 (11,1 GW).

Globally, 21 new offshore wind farms were taken into operation in Asia (19), and Europe (2).

6 GW

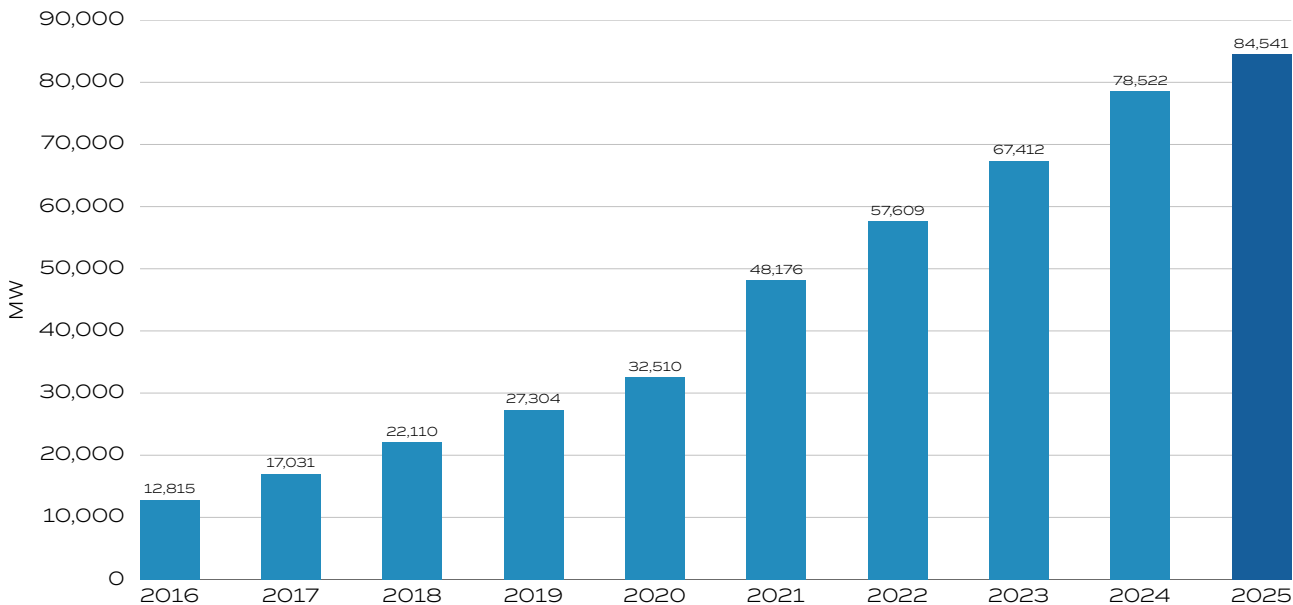
Globally added offshore wind capacity in 2025

Global Offshore Wind Capacity

Global offshore wind capacity reaches nearly 85 GW

Global offshore wind capacity in operation¹ - cumulative

IN OPERATION



Globally installed offshore wind capacity reached more than 84 GW by the end of 2025, more than half of which is now installed in China.

The average size of a newly added offshore wind farm in 2025 slightly decreased to 287 MW (compared to 336 MW in 2024).

Worldwide, 334 offshore wind farms are currently in operation, 200 of which are in Asia, 131 in Europe and 3 in the USA.

84.5 GW

Global offshore wind capacity in operation

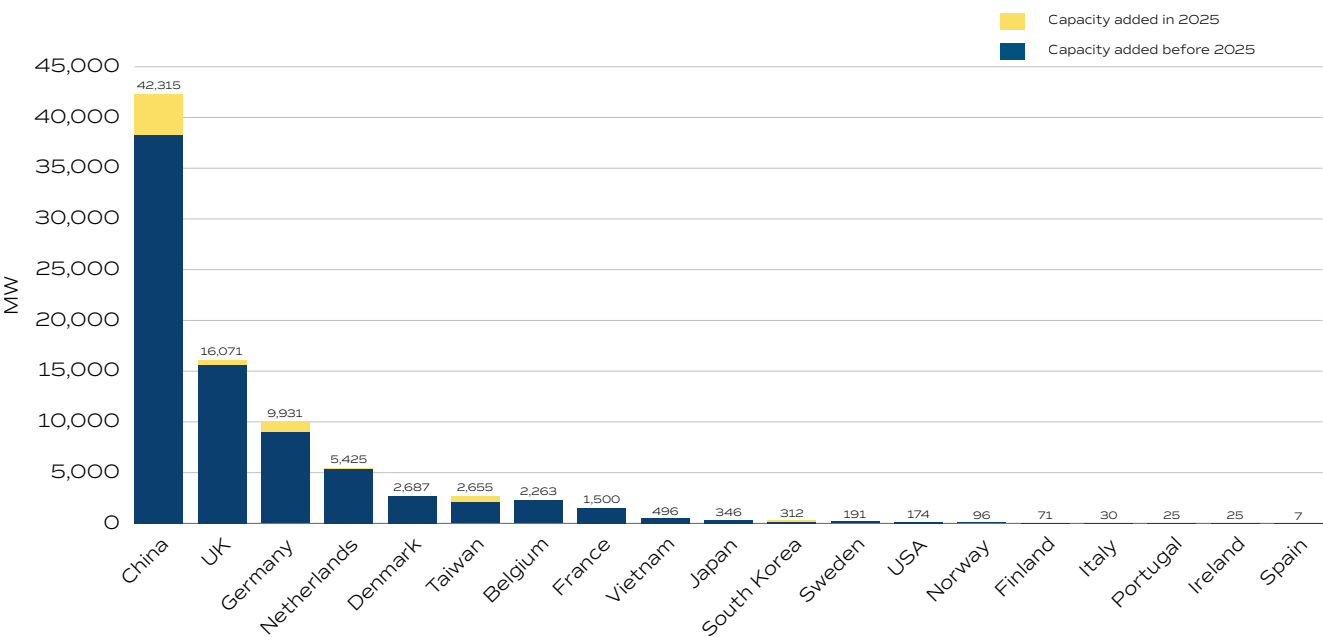
¹ In operation: All turbines installed and first power

Top Markets

Asia and Europe lead offshore wind growth

Global offshore wind capacity in operation – by country

IN OPERATION



China's growth continues with more than 4 GW of newly installed capacity in 2025, increasing its total installed capacity to 42,3 GW.

The UK remains the world's second largest offshore wind market with 16,1 GW of total installed capacity of which 448 MW were added in 2025.

Germany has completed its largest project to date (Borkum Riffgrund 3, 913 MW), bringing its total installed capacity to nearly 10 GW.

4 GW

Offshore wind capacity added in China in 2025

In Detail:

Global offshore wind farms put into operation in 2025

No.	Wind Farm	MW	Units	MW/Unit	Turbine	Location
1	Borkum Riffgrund 3	913	83	11	SG 11.0-200 DD	DE
2	Hainan CZ1 Lingao Northwest	600	60	10	Mingyang Smart Energy 10 MW	CN
3	Hainan CZ3-1 Danzhou Northwest	600	60	10	H10000-242	CN
4	Nearť na Gaoithe	448	54	8	SG 8.0-167 DD	UK
5	Shantou Datang Le Men I expansion	354	27	13	-	CN
6	Shanghai Jin Shan Phase 1	306	36	8,5	GW175-8.0MW	CN
7	Jiangsu Dafeng H2	298	35	8,5	GW175-8.0MW	CN
8	Hai Long Offshore Wind 2A	294	21	14	SG 14-222 DD	TW
9	Guangxi Fang Cheng Gang A Section 2	289	34	8,5	MySE8.5-230	CN
10	Hai Long Offshore Wind 2B	232	16	14	SG 14-222 DD	TW
11	Jiangsu Dafeng H8-1	210	25	8	GWH230-8.5	CN
12	Cangnan 1 Phase 2	204	24	8,5	EN-226/8.5	CN
13	Jiangsu Dafeng H1	204	24	8,5	GW175-8.0MW	CN
14	Jiangsu Dafeng H15	204	24	8,5	GWH230-8.5	CN
15	Jiangsu Dafeng H17	203	25	8	GWH230-8.5	CN
16	Jiangsu Dafeng H9	197	24	8	GWH230-8.5	CN
17	Jiangsu Dafeng H16	196	23	8,5	GW175-8.0MW	CN
18	Jiangsu Dafeng H10	153	18	8,5	GW175-8.0MW	CN
19	Jeonnam Sinan Phase 1 (Jeonnam Offshore Wind Power)	96	10	10	GW175-8.0MW	KR
20	Sanxia Linghang Hao 16 MW Floating Demo	16	1	16	GWH252-16-F	CN
21	Yeonggwang Yaksu	4	1	4	U151-4.3	KR
Total		6,019				

913 MW



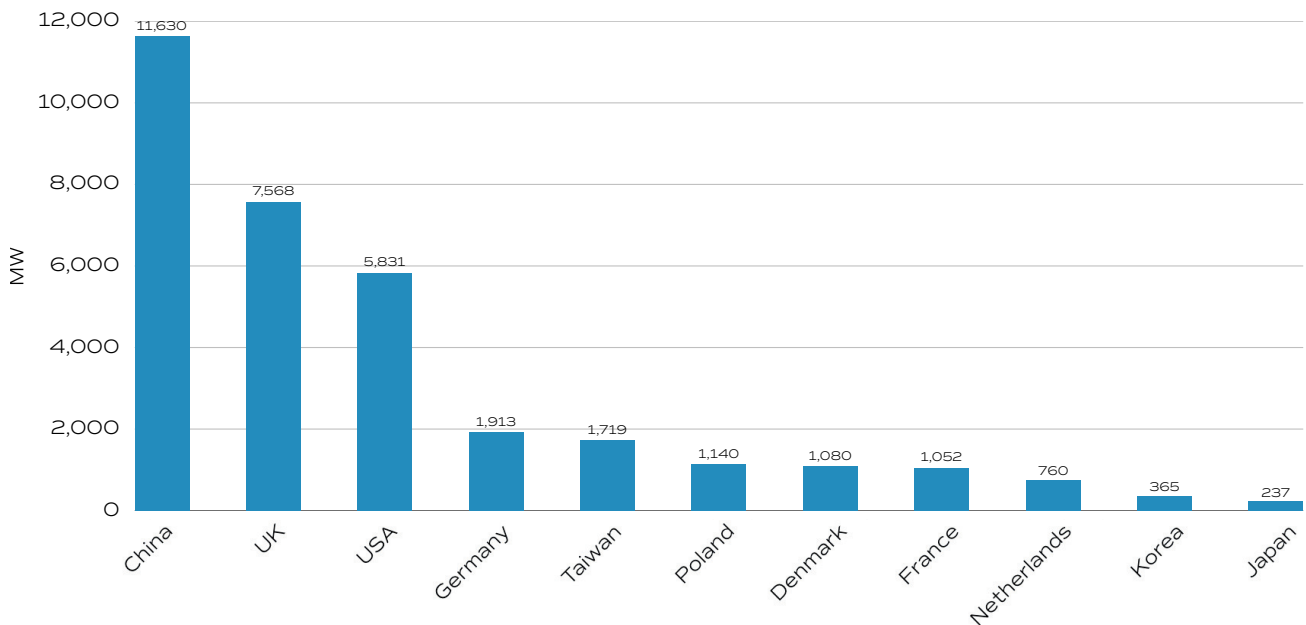
Largest project put into operation in 2025

Construction

Offshore wind growth continues in 2025

Global offshore wind capacity under construction² by the end of 2025

UNDER CONSTRUCTION



China's offshore wind sector continues to grow with more than 11 GW currently under construction.

The UK is following in second place with 7,6 GW and the USA is in third place with 5,8 GW.

Poland is now in sixth place, after Germany and Taiwan, with 1,1 GW of capacity currently under construction.

33.3 GW

Global offshore wind capacity under construction

² Under construction: First offshore component installed (e.g. foundation)

In Detail:

Offshore wind farms under construction

No.	Wind Farm	MW	Units	MW/Unit	Turbine	Location
1	Coastal Virginia	2,587	176	14.5	SG 14-222 DD	US
2	East Anglia 3	1,400	95	14.5	SG 14	UK
3	Sofia	1,400	100	14	SG 14-222 DD	UK
4	Dogger Bank C	1,218	87	14	Haliade-X 14 MW	UK
5	Shenneng Hainan CZ2 Demonstration	1,204	117	10	-	CN
6	Dogger Bank A	1,235	95	13	Haliade-X 13MW	UK
7	Dogger Bank B	1,235	95	13	Haliade-X 13MW	UK
8	Baltic Power	1,140	76	15	V236-15MW	PL
9	Thor	1,080	72	15	SG 14-236 DD	DK
10	Inch Cape	1,080	72	15	V236-15MW	UK
11	CGN Yangjiang Fan Shi 2	1,008	63	16	-	CN
12	CGDG Shantou Zhongpeng II	1,001	91	11	-	CN
13	CTG Yangjiang Qingzhou 7	1,000	78	13	GWH252-13.6MW,MySE14-260	CN
14	CTG Yangjiang Qingzhou 5	1,000	125	8	-	CN
15	He Dreiht	960	64	15	V236-15MW	DE
16	Sunrise	924	84	11	SG 8.0-167 DD	US
17	Empire Wind 1	810	54	15	V236-15MW	US
18	Vineyard Wind 1	806	62	13	Haliade-X 13MW	US
19	Hollandse Kust West Site VI	760	52	14.5	V236-15MW	NL
20	Revolution Wind	704	64	11	SG 11.0-200 DD	US
21	Lianjiang Waihai	702	39	18	Dongfang Electric 18MW	CN
22	Shandong Bozhong G (North and South)	697	69	10	-	CN
23	Nordseecluster A	660	44	15	V236-15MW	DE
24	Yuedian Yangjiang Qingzhou 2	600	55	11	MYSE11-230	CN
25	Greater Changhua 4	583	42	14	SG 14-236 DD	TW
26	Huaneng Yuhuan No. 2	508	31	16.5	Dongfang Electric 18MW,SEW16.0-252	CN
27	Hai Long 3	504	36	14	SG 14-222 DD	TW
28	Guohua Investment Shandong 500MW	500	63	8	-	CN
29	Hainan CZ8 Dongfang West	500	42	12	MySE10-242	CN
30	Dieppe Le Treport	496	62	8	SG 8.0-167 DD	FR
31	Noirmoutier	496	62	8	SG 8.0-167 DD	FR
32	Shengsi 3 and 4	410	41	10	SEW8.5-230	CN

2.6 GW

Largest offshore wind farm
under construction

In Detail:

Offshore wind farms under construction

No.	Wind Farm	MW	Units	MW/Unit	Turbine	Location
33	Yeonggwang Nakwol	365	64	5.5	-	KR
34	Greater Changhua 2b	337	24	14	SG 14-236 DD	TW
35	Windanker	315	21	15	SG 14-236 DD	DE
36	Huaneng Rui An No. 1	308	22	14	-	CN
37	Guohua Peninsula South Phase 1	306	36	8.5	-	CN
38	Laoting Yuetuo Island Phase 1 Demo	304	31	10	-	CN
39	CTG Shandong Yantai Muping Phase 1	301	36	8.5	-	CN
40	Guohua Peninsula South Phase 2	300	35	8.5	-	CN
41	Changhua TPC Phase 2	295	31	9.5	V174-9.5MW	TW
42	Fujian Ningde Xiapu Area B	288	36	8	-	CN
43	Shengsi 7	252	18	14	-	CN
44	Zhuanghe (Dalian 5)	250	28	9	-	CN
45	Kitakyushu Hibikinada Offshore Wind Farm	220	25	9.5	V174-9.5MW	JP
46	Hainan PFS-1 Wanning Southeast (floating)*	192	12	16	-	CN
47	EFGL (floating)*	30	3	10	V164-10 MW	FR
48	EolMed (floating)*	30	3	10	V164-10 MW	FR
49	Goto Floating Offshore Wind Farm*	17	8	2	HTW2.1-80A	JP
Total		33,317				

* At least one floater in final assembly

269 MW

Floating offshore wind
capacity under construction



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