

Marine Battery Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

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Report description:

The global marine battery market attained a value of USD 742.90 Million in 2024. The market is estimated to grow at a CAGR of 16.20% during 2025-2034 to reach a value of USD 3334.20 Million by 2034.

Global Marine Battery Market Growth

The global market for marine battery is primarily driven by the electrification of the marine sector to reduce its emissions. In July 2023, International Maritime Organisation (IMO) member states adopted the updated 2023 IMO Strategy to reduce the GHG emissions from ships and achieve net-zero GHG emissions from international shipping by or around 2050. It also includes the adoption of alternative zero and net-zero GHG fuels by 2030.

Batteries on ships can be used as part of a renewable energy solution for hybrid marine power and electrical propulsion systems. Batteries allow fully electric ships to operate in zero-emission mode, serving as the sole source of electricity. As a result, they limit GHG emissions, enabling ships to comply with strict port requirements and travel in environmentally controlled areas (ECA).

As of 2023, the marine sector's greenhouse gas emissions, which make up 3% of the world's total, have climbed by 20% over the last decade, aiding the marine battery market. In the absence of intervention, emissions may increase to 130% of 2008 levels by 2050. The marine fleet is rapidly ageing. Many ships are too old to be scrapped or too young to be retrofitted, with more than half of them being older than 15 years. The ageing fleet provides an opportunity for the marine sector to invest in low-emission electric and hybrid vessels.

Figure: CO2 Emissions by Country of Vessel Ownership (Million Tonnes), 2022

Key Trends and Recent Developments

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Favourable government initiatives; advancement in battery technology; and investment in strengthening the Navy are the key trends impacting the global marine battery market development

April 2024

Yinson GreenTech (YGT), a member of Norwegian Business Association Singapore NBAS, partnered with Eastern Pacific Shipping (EPS) to conduct electric vessel trials during Singapore Maritime Week 2024. YGT, known for its green technology solutions, had collaborated with EPS to pioneer the first cargo delivery with an electric vessel at the Port of Singapore. This initiative had been led by YGT's marine electrification business, marinEV.

March 2024

Singapore-based Pyxis, a maritime start-up officially launched its first 100% electric passenger vessel, X Tron. X Tron is the first in a series of electric port passenger vessels made by Pyxis. The battery-powered vessel has a range of up to 50 nautical miles and is expected to operate out of Marina South Pier.

March 2024

Infineon Technologies AG and HD Korea Shipbuilding & Offshore Engineering Co. Ltd. signed a non-binding MoU to jointly develop emerging applications for marine engine electrification. The collaboration aims to leverage Infineon's energy-efficient power semiconductor technology to innovate propulsion-drive solutions for ship electrification.

Governmental investment to decarbonize the marine sector

Governments globally are supporting the decarbonisation of marine-based activities, such as maritime transport by encouraging green shipping. For instance, the European Investment Bank (EIB) invested USD 242.5 million in shipping and USD 396.2 million in ocean-related research and innovation between 2019 and 2023.

A rising ageing marine fleet globally, aid marine battery market expansion

As of 2023, the average age of commercial cargo vessels is over 20 years. As a result, proper maintenance and incorporation of technology necessitates the replacement of vessels, providing an opportunity for the adoption of electric and hybrid vessels. Asian countries such as Japan are constantly focusing on replacing their ageing fleet to strengthen their marine sector.

Advancement in marine battery technology drives the marine battery market growth

The advancement in dual-purpose marine batteries offering improved energy density and fast charging options aids their adoption. Additionally, the decreasing cost of lithium-ion phosphate batteries while offering high energy density, chemical stability, and a prolonged life cycle positively impacts the marine battery market revenue.

Rising investments in strengthening the navy, aids shipbuilding to enhance maritime security

Governments globally are increasing their defence budgets to strengthen their security, providing an opportunity for green technologies, such as marine batteries. For instance, in 2023, the USA planned to expand the Defense Department spending to USD 842 billion in 2024, up 3.2% over FY23. Under this plan, the Navy and Marine Corps' budget is expected to grow by more than USD 11 billion in 2024.

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Global Marine Battery Industry Trends

The global marine sector, which primarily relies on heavy fuel oil, is a major contributor to global CO₂, SO₂, and NO_x emissions. As a 'hard to abate' industry, international shipping contributes to around 2-3% of global GHG emissions, as of 2022.

In July 2023, the member states of the International Maritime Organization (IMO) adopted the 2023 IMO Strategy on Reduction of GHG Emissions from ships. The revised strategy aims for net-zero GHG emissions from international shipping by around 2050. It also includes a target to promote the adoption of alternative zero and near-zero GHG fuels by 2030. The electrification of maritime vessels is a low-emission alternative to traditional fuels.

Industry Outlook

Total seaborne trade experienced a global increase from 10,247 million tons in 2016 to 10,985 million tons in 2021, with an annual growth rate of 3.2%, according to UNCTAD's World Seaborne Trade data. Developed economies saw a modest rise in loaded volumes from 4,500 million tons to 4,936 million tons, growing at an annual rate of 2.4%. Discharged volumes in developed economies increased from 4,278 million tons to 4,553 million tons, with a notable annual growth rate of 4.1%, resulting in a balance shift from -53 million tons to 658 million tons.

Developing economies showed significant growth in loaded volumes, climbing from 5,747 million tons in 2016 to 6,049 million tons in 2021, with a 3.9% annual growth rate. Discharged volumes in developing economies rose from 5,750 million tons to 6,698 million tons, with a 2.7% annual growth rate, leading to a balance change from -4 million tons to -648 million tons.

Within developing economies, Africa's loaded volumes increased from 694 million tons to 762 million tons, with an annual growth rate of 3.6%. Discharged volumes in Africa rose sharply from 480 million tons to 553 million tons, achieving an 8.5% annual growth rate, while the balance remained relatively stable, changing slightly from 214 million tons to 209 million tons.

The Americas saw a slight rise in loaded volumes from 1,355 million tons to 1,383 million tons, with a 0.7% annual growth rate. Discharged volumes increased from 566 million tons to 638 million tons, with an 8.2% annual growth rate, resulting in a balance improvement from 789 million tons to 745 million tons.

Asia and Oceania experienced significant growth in loaded volumes, rising from 3,698 million tons to 3,904 million tons, with a 5.1% annual growth rate. Discharged volumes increased from 4,704 million tons to 5,507 million tons, with a 1.5% annual growth rate, leading to a balance shift from -1,006 million tons to -1,603 million tons.

Total goods loaded worldwide increased from 3,366 million tons in 1976 to 10,985 million tons in 2021, reflecting robust growth in global trade, according to UNCTAD's development of goods loaded data. Crude oil shipments peaked at 1,832 million tons in 2016 before slightly declining to 1,700 million tons in 2021, indicating fluctuating oil trade volumes.

Dry cargo consistently grew from 1,522 million tons in 1976 to 8,033 million tons in 2021, highlighting the increasing demand for bulk and containerized goods. Other tanker trade volumes also expanded, reaching 1,252 million tons in 2021, up from 289 million tons in 1976, showcasing the diversification in liquid bulk trade beyond crude oil.

Marine Battery Industry Statistics Globally

From 1976 to 1996, total goods loaded rose steadily from 3,366 million tons to 4,758 million tons, driven by increases in dry cargo from 1,522 million tons to 2,631 million tons. This period also saw crude oil volumes grow modestly from 1,555 million tons to

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1,590 million tons, while other tanker trades increased from 289 million tons to 537 million tons.

Between 2001 and 2011, total goods loaded surged from 6,020 million tons to 8,739 million tons, with dry cargo experiencing significant growth from 3,844 million tons to 5,959 million tons. Crude oil volumes remained relatively stable, fluctuating around 1,678 million tons to 1,751 million tons, while other tanker trade saw a notable increase from 499 million tons to 1,028 million tons.

By 2021, total goods loaded reached 10,985 million tons, with dry cargo at 8,033 million tons, reflecting the highest growth rate among cargo types. The steady increase in other tanker trade to 1,252 million tons and the slight decline in crude oil to 1,700 million tons indicate shifting dynamics in global maritime trade, with a growing emphasis on diversified cargo types beyond crude oil.

The market is dominated by key players like Corvus Energy, Akasol AG, Siemens AG, and Toshiba Corporation. Market Competition in the Global Marine Battery Market:

- Heavy investment in advanced battery technologies such as lithium-ion and solid-state batteries.
- Product differentiation with a variety of marine batteries, including lithium-ion, lead-acid, and fuel cells.
- Strategic partnerships between battery manufacturers and maritime companies for product development and market expansion.
- Adherence to stringent maritime safety and environmental regulations, and obtaining necessary certifications may impact the marine battery market dynamics and trends.
- Market segmentation by application (commercial, defense, leisure) and vessel type (ferries, yachts, submarines).
- Critical cost management and competitive pricing strategies due to high initial investment requirements.
- Emphasis on sustainability and focusing on eco-friendly and energy-efficient marine batteries is increasing the marine battery market share.
- Strengthening geographical presence in key maritime regions like Europe, North America, and Asia-Pacific.

Increasing Demand and Technological Advancements Strengthening the Global Marine Battery Market

- Increasing demand for electric and hybrid marine vessels is supporting the marine battery demand growth.
- Technological advancements in battery efficiency and lifespan.
- Strong regulatory support for reducing maritime emissions.
- Established market presence of key players with robust R&D capabilities.

High Costs and Limited Infrastructure Weakening the Global Marine Battery Market

- High initial costs of marine battery systems.

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- Limited charging infrastructure in many regions.
- Heavy weight and size of current battery technologies negatively impacts the growth of the marine battery market.
- Dependence on raw material availability and price fluctuations.

Advancements in the Global Marine Battery Market

- Development of high-capacity lithium-ion battery systems with improved energy density and enhanced safety features for electric and hybrid marine vessels.
- Focus on advanced battery modules with robust cooling and thermal management solutions to optimize performance and extend battery lifespan in marine applications.
- Introduction of integrated energy storage systems designed specifically for offshore and marine use, while prioritizing energy efficiency and environmental sustainability, will likely influence the marine battery demand forecast.
- Advancements in rechargeable batteries offering long life, rapid charging capabilities, and high safety standards for various marine applications.
- Development of high-performance lithium-ion battery systems tailored for marine use, emphasizing sustainability and energy efficiency for ferries, yachts, and other vessels.
- Creation of advanced lithium-ion battery solutions with high energy density and long operational life to meet the demanding requirements of marine applications.

Renewable Energy Integration and R&D Investment Offering Opportunities in the Global Marine Battery Market

- Expansion of renewable energy integration in marine vessels.
- Growing investment in marine battery R&D and innovation.
- Rising adoption of autonomous and unmanned marine vehicles is providing several marine battery market opportunities.
- Emerging markets and increasing global maritime activities.

Competition and Regulatory Compliance Can Pose Risk to the Global Marine Battery Market

- Intense competition from alternative marine propulsion systems.
- Regulatory hurdles and varying international standards.
- Environmental concerns related to battery disposal and recycling is hampering the marine battery industry.
- Economic downturns impacting investment and adoption rates.

Supply Chain Structure:

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Raw Material Suppliers:

- Suppliers of lithium, cobalt, nickel, and other essential materials for battery production.
- Challenges include price volatility and supply chain disruptions.

Battery Manufacturers:

- Companies involved in the design, development, and production of marine batteries.
- Integration of advanced technologies and manufacturing efficiencies is critical.

System Integrators:

- Firms that integrate batteries with marine propulsion systems, energy management systems, and other onboard technologies help in increasing the marine battery industry revenue.
- Collaboration with OEMs and shipbuilders is essential for seamless integration.

Distributors and Dealers:

- Channels responsible for distributing marine batteries to end-users, including OEMs and the aftermarket.
- Key for market penetration and customer reach.

Global Marine Battery Market Industry Segmentation

□ Global Marine Battery Market Report and Forecast 2025-2034 □ offers a detailed analysis of the market based on the following segments:

Market Breakup by Application

- Commercial
- Defence

Market Breakup by Battery Design

- Solid-State Batteries
- Flow Batteries

Market Breakup by Battery Function

- Starting Batteries
- Deep-Cycle Batteries
- Dual-Purpose Batteries

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Market Breakup by Battery Type

- Lithium
- Lead-Acid Battery
- Fuel Cell

Market Breakup by Nominal Capacity

- <100AH
- 100-250AH
- >250AH

Market Breakup by Propulsion Type

- Fully Electric
- Hybrid
- Conventional
- Ship Autonomy

Market Breakup by Sales Channel

- OEM
- Aftermarket

Market Breakup by Ship Power

- <75 KW
- 75-150 KW
- 150-745 KW
- 740-7560 KW
- >7560KW

Market Breakup by Ship Range

- <50 Km
- 50-100 Km
- 100-1000 Km
- >1000 Km

Market Breakup by Region

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

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Global Marine Battery Market Share

Based on application, the commercial segment accounts for a significant share of the market due to expanding trade

Modern battery systems can extend the range of ships, reduce emissions, and decrease maintenance demands by optimizing engine and generator operations. This has increased their use in marine trade. Plug-in hybrid propulsion systems are advantageous for inland towboats in certain trades, such as to conduct environmentally friendly barge transportation. As per marine battery industry analysis, in 2022, the Netherlands accounted for over 50% of the registered goods transport vessels used on the EU inland waterways with metal ores being the largest transported goods category.

Based on battery type, lithium is a major contributor to the marine battery market due to improvement in their charging efficiency

Lithium batteries provide a reliable, efficient, and powerful energy storage solution for commercial marine vessels. They offer longer lifespans, faster charging times, no active maintenance requirements, and are lightweight, making them suitable for most demanding marine applications. A key advancement in dual-purpose lithium marine battery technology is the significant improvement in charging efficiency.

Competitive Landscape

The market players are focusing on providing products at competitive prices and high quality, with improved customer service, product support, and performance features.

Toshiba Corporation

Headquartered in Japan and founded in 1875, Toshiba Corporation delivers products and services through its business domains, namely, Energy Systems & Solutions, Infrastructure Systems & Solutions, Building Solutions, Retail & Printing Solutions, Electronic Devices & Storage Solutions, Digital Solutions, and Battery Business. The company offers solutions for the marine battery industry under the SCiB[®] lithium-ion battery brand.

Siemens Energy AG

Headquartered in Germany and founded in 1847, Siemens Energy, a subsidiary of Siemens AG is a leading entity in the global energy technology sector. The company's comprehensive portfolio includes conventional and renewable technologies, such as gas turbines, steam turbines and power transformers. Its marine battery solution, BlueVault[™] energy storage solutions is an advanced lithium-ion battery-based solution, suited for both all-electric and hybrid energy-storage applications.

Corvus Energy Holding

Headquartered in Norway and founded in 2009, Corvus Energy specialises in the deployment of large-scale energy storage systems (ESS), employing cutting-edge lithium-ion battery technology that is reliable across a diverse array of demanding maritime and transportation applications. Corvus Energy serves as the premier supplier of battery systems for hybrid and electric commercial marine vessels, including ferries, cruise ships, offshore supply vessels, and tugboats.

Leclanche SA

Headquartered in Switzerland and founded in 1909, Leclanche stands as a globally renowned provider of top-tier energy storage

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solutions. The company encompasses the development of proprietary lithium cells, battery modules, racks, and packs, alongside rafting sophisticated Battery Management Systems and Energy Management Software. The company's marine battery solution includes Navius MRS-3 Marine Rack System.

Other notable players in the marine battery market report are PowerTech Systems, Saft Groupe SAS, Contemporary Amperex Technology Co. Ltd., GS Yuasa Corporation, AYK Energy Ltd., Echandia Group AB, and EVE Energy Co., Ltd., among others.

Global Marine Battery Market Regional Insights

Europe is a prominent region in the market due to rising governmental initiatives to lower GHG emissions of the marine sector

The ferry industry is a significant contributor to GHG emissions. In 2021, ferries and cargo ships accounted for up to 4% of the EU's CO2 emissions. Without prompt action, transport emissions could reach 40% by 2030. Hence the ferry industry is adopting electrification to cut its emissions by 800,000 tonnes annually.

The UK is a significant naval shipbuilder and holds around 5% market share in the nascent green shipbuilding sector. Its Maritime Research & Innovation UK (MarRI-UK) initiative launched in 2019 is engaged in developing and leveraging emerging technologies. Some of its key projects include using batteries for marine applications and electrification of the domestic passenger ferries.

An ageing marine fleet and rapid decarbonisation of the marine sector in the Asia Pacific provides an opportunity for the marine battery market. As of 2022, 5,000 of Japan's 7,000 passenger vessels are over 15 years, providing an opportunity to replace the ageing fleet with battery-operated vessels. India targets 100% of green fuel-powered vessels by 2047. Further, the ASEAN countries are focused on reducing the emissions of their marine transportation, thus increasing the marine battery market value. Singapore for instance, aims for full electric propulsion and net zero fuels for its harbour craft fleet by 2050.

Marine Battery Market Report Snapshots

Marine Battery Companies

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