

ANMD-MRS32-319 · Sustainable Aviation & Maritime

Shore Power (Cold Ironing) Systems

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Shore power (cold ironing) systems plug ships into shore electricity to eliminate at-berth diesel emissions. High-voltage and low-voltage shore connections and mobile/barge shore power let port authorities, terminal operators and shipowners switch off auxiliary engines in port. This decision-grade study sizes the global market three ways — value, installations and electrified berths — across system type, sub-type and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond operational performance, shore power delivers measurable at-berth emissions elimination, port-city air-quality improvement and harbour-noise reduction, while grid-power sourcing shapes the natural-capital story.

Mapped Sustainable Development Goals:

SDG 2 Zero Hunger	SDG 6 Clean Water	SDG 7 Affordable Clean Energy	SDG 13 Climate Action	SDG 15 Life on Land
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Measurable sustainability outcomes assessed:

- Zero at-berth emissions when auxiliary engines are switched off
- Lower port-city air pollution and improved public health
- Quieter harbours through reduced engine noise at berth
- Grid-electricity carbon intensity and port-grid impact as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	5 SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Europe leads on mandates; North America scales on air quality; Asia Pacific is the growth engine, electrifying major berths.

MARKET OVERVIEW

From selected berths to mandated port infrastructure — shore electricity replaces at-berth diesel.

The shore power market is moving from selected berths to mandated port infrastructure. Demand is driven by EU and California at-berth rules, port-city air quality and IMO pressure, supported by standardised high-voltage connections. The market is read three ways — value, installations and electrified berths — and forecast under four scenarios, each region reported separately.

- Europe leads on mandates — EU FuelEU Maritime and AFIR rules require shore power at major ports
- North America scales on air quality — California and US ports pair at-berth rules with electrification
- System type and sub-type segment the value — across high-voltage, low-voltage and mobile/barge
- Zero at-berth emissions is the differentiator — shore electricity auxiliary engines cannot match in port

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
Europe	Mandate leader	Germany, Netherlands, Norway, UK — FuelEU Maritime, AFIR
North America	Air-quality scaling	United States, Canada — California at-berth rules, port electrification
Asia Pacific	Growth engine	China, South Korea, Singapore — major-berth electrification
Middle East	High-growth	UAE, Saudi Arabia — port investment, sovereign capital
Latin America	Emerging	Brazil, Panama — port modernisation
Africa	Frontier	South Africa, Egypt, Morocco — port electrification

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • At-berth emissions rules (EU, California) • Port-city air-quality and health pressure • IMO and port-decarbonisation targets • Noise-reduction and community demand • Shore-connection and converter technology gains 	<ul style="list-style-type: none"> • Port-grid capacity and upgrade cost • Ship-shore standardisation and retrofit • High infrastructure CAPEX • Frequency-conversion and equipment cost • Utilisation and cost-recovery uncertainty

SEGMENTATION SNAPSHOT

By System Type	High-voltage shore connection · low-voltage shore power · mobile / barge
By Sub-Type	Fixed · containerised · barge-based
By Component	Shore connections · frequency converters · cable management · transformers · switchgear
By Application	Container · cruise · ro-ro · bulk berths
By End User	Port authorities · terminal operators · shipowners · utilities
By Business Model	Infrastructure sale · concession · power-as-a-service

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Shore Power (Cold Ironing) Systems
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
- › Chapter 17. Middle East Market Intelligence
- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans established electrical and automation majors, specialist shore-connection providers and port integrators. Deal activity — shore-power partnerships, port-electrification programmes and standardisation initiatives — signals a market consolidating around bankable, repeatable designs.

Representative players profiled in the full report:

ABB Ltd · Cavotec SA · Wärtsilä Oyj Abp · Siemens AG · Schneider Electric SE · and further profiled players across the value chain.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a clear, condition-based investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global shore power (cold ironing) systems market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability assessment in a single architecture.

- › **Triangulated sizing** — every market read three ways (value, installations and electrified berths) so value, volume and electrified berths views reconcile rather than conflict.
- › **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, condition-based bankability view.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, port authorities, terminal operators, shipowners, utilities, equipment manufacturers, regulators, lenders, policymakers, and corporate strategy and ESG teams.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.