U.S. Market Overview & Insights

Business Network for Offshore Wind
Business Network for Offshore Wind

1. Focus on developing US offshore wind industry and its supply chain

2. Not-for-Profit, Membership-Based

3. Provide: Information, Education, Introductions
U.S. OSW Structure

**STATES**
Request call areas, enact policy that drives the market, enforce state and local regulations

**U.S. BOEM / U.S. BSEE**
Siting, leasing, permitting and approval of plans, regulate OSW projects

**PRIVATE DEVELOPERS / LEASEES**
Acquire lease rights and develop projects
State Commitments to OSW

The trends of sum of Megawatts and sum of Megawatts for year
Offtake Pathways

17,578.2 MWs with offtake pathways as of Feb. 2022

8,434.5 State procurements that took place during 2021 (see Fig. 7, p. 18)

9,143.7 State procurements that took place prior to 2021 (see Fig. 8, p. 19)

Photo courtesy of Christian Ennerfelt
State Procurements During 2021

**NEW JERSEY**
- 2021 ATLANTIC SHORES OFFSHORE WIND: 1,510
- 2021 OCEAN WIND 11: 1,148

**MASSACHUSETTS**
- 2021 COMMONWEALTH WIND: 1,232
- 2021 MAYFLOWER WIND 11: 400

**NEW YORK**
- 2021 BEACON WIND: 1,230
- 2021 EMPIRE WIND 11: 1,260

**MARYLAND**
- 2021 MOMENTUM WIND: 808.5
- 2021 SKIPJACK WIND 11: 846

**TOTAL**
8,434.5
OSW Leasing Path Forward 2021–2025

Our path forward will help achieve the first ever **national offshore wind goal** to deploy **30 gigawatts of offshore wind by 2030**, which would create **nearly 80,000 jobs**.
Biden Administration 2025 Goals: A Global Perspective

• 16 COPs approved by 2025, representing at least 19GW of OSW

• Currently, ~50GW deployed globally

• UK + Germany combined = 20GW
Supply Chain Development: Major Component Manufacturing

- SOV & Jacket Foundations / Huma, LA
- Wind Turbine Installation Vessel / Brownsville, TX
- Concrete Foundations / Ravena, NY
- Tower Manufacturers / Albany, NY
- Array Cable Facility / Brayton Point, MA
- Array Cables / Bristol, CT
- Monopile Foundation & CTVs / Providence, RI
- Monopile Foundation / Paulsboro, NJ
- Nacelle Assembly Facility / Alloways Creek, NJ
- Tower, Monopile, Array Cable Facilities / Baltimore, MD
- Blade Facility / VA
- Blade Facility / Portsmouth, VA
- Offshore Substation / Ingleside, TX
- HV Cable Facility / Charleston, SC
- Array Cables / Mobile, AL
- Tower, Monopile, Array Cable Facilities / MD
- Monopile Foundation & CTVs / Providence, RI
- Wind Turbine Installation Vessel / Brownsville, TX

THE BUSINESS NETWORK FOR OFFSHORE WIND

offshorewindus.org

© Business Network for Offshore Wind

Facebook offshorewindus
Supply Chain Development: National Opportunities
OSW ACTIVITY DECIDED
OSW LEASE AREAS

1. COEYMANS (Manufacturing)
2. PORT OF PROVIDENCE (Construction, Manufacturing)
3. BRAYTON POINT (Staging & Manufacturing)
4. NEW BEDFORD (Staging)
5. QUONSET POINT (Construction)
6. NEW LONDON STATE PIER (Staging/Pre-Assembly & Construction/Installation)
7. BRIDGEPORT (Fabrication, Staging, O&M)
8. PORT JEFFERSON (O&M)
9. SOUTH BROOKLYN MARINE TERMINAL (O&M)
10. HOMEPORT PIER (Staging)
11. PAULSBORO (Manufacturing)
12. ATLANTIC CITY (O&M)
13. NEW JERSEY WIND PORT (Staging & Manufacturing)
14. TRADEPORT ATLANTIC (Staging & Manufacturing)
15. HAMPTON ROADS (Manufacturing)
16. PORTSMOUTH (Staging)
17. CHARLESTON, SC (Cables)
18. TISBURY (O&M)
19. PORT OF ALBANY (Manufacturing)
20. SALEM (Assembly & Staging)
21. OCEAN CITY (O&M)
<table>
<thead>
<tr>
<th>Port Name</th>
<th>State</th>
<th>Laydown Area (acres)</th>
<th>Quayside Length (m)</th>
<th>Number of berths</th>
<th>Berth Depth (m)</th>
<th>Channel Depth (m)</th>
<th>Bearing Capacity (t/m²)</th>
<th>Air Draft Limit (m)</th>
<th>Readiness Level (WTIV)</th>
<th>Readiness Level (Feeders)</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Bedford ^8</td>
<td>MA</td>
<td>29</td>
<td>366</td>
<td>3</td>
<td>9.1</td>
<td>9.1</td>
<td>20 t/m²</td>
<td>None</td>
<td>Berth/channel depth, and quayside length</td>
<td>Quayside length</td>
</tr>
<tr>
<td>New London State Pier ^9</td>
<td>CT</td>
<td>30</td>
<td>1244</td>
<td>4</td>
<td>12.2</td>
<td>10</td>
<td>Assume &gt; 15</td>
<td>None</td>
<td>Channel depth</td>
<td></td>
</tr>
<tr>
<td>South Brooklyn Marine Terminal</td>
<td>NY</td>
<td>88</td>
<td>417</td>
<td>2</td>
<td>10.7</td>
<td>12.2</td>
<td>30</td>
<td>60</td>
<td>Berth depth, quayside length and air draft</td>
<td>Quayside length</td>
</tr>
<tr>
<td>New Jersey Wind Port ^10</td>
<td>NJ</td>
<td>70</td>
<td>854</td>
<td>4</td>
<td>11.5</td>
<td>9.88</td>
<td>29.8</td>
<td>None</td>
<td>Berth/channel depth, bearing capacity</td>
<td></td>
</tr>
<tr>
<td>Tradepoint Atlantic ^11</td>
<td>MD</td>
<td>3,300</td>
<td>1,021</td>
<td>2</td>
<td>10.97</td>
<td>10.97</td>
<td>None</td>
<td>None</td>
<td>Berth/channel depth, bearing capacity</td>
<td></td>
</tr>
<tr>
<td>Portsmouth Marine Terminal</td>
<td>VA</td>
<td>287</td>
<td>1,079</td>
<td>3</td>
<td>13.11</td>
<td>13.11</td>
<td>Assume &gt;15 t/m²</td>
<td>None</td>
<td>Berth/channel depth, bearing capacity</td>
<td></td>
</tr>
<tr>
<td>Other ports (1)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Other ports (4)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Other ports (9)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>
Table 11. West Coast Ports Marshalling Capabilities and Assessment

<table>
<thead>
<tr>
<th>Port Name</th>
<th>State</th>
<th>Laydown Area (acres)</th>
<th>Quayside Length (m)</th>
<th>Number of berths</th>
<th>Berth Depth (m)</th>
<th>Channel Depth (m)</th>
<th>Bearing Capacity (t/m²)</th>
<th>Air-Draft Limit (m)</th>
<th>Readiness Level (Floating Substructure)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Port of Seattle</td>
<td>WA</td>
<td>1,541.9</td>
<td>2,400</td>
<td>20</td>
<td>23.2</td>
<td>&gt;30</td>
<td>None</td>
<td>None</td>
<td>High congestion and bearing capacity</td>
</tr>
<tr>
<td>Astoria</td>
<td>OR</td>
<td>20.55</td>
<td>1551</td>
<td>5</td>
<td>12.2</td>
<td>14</td>
<td>None</td>
<td>None</td>
<td>Laydown and bearing capacity</td>
</tr>
<tr>
<td>Port at Coos Bay³³</td>
<td>OR</td>
<td>1,335</td>
<td>80</td>
<td>7</td>
<td>11.28</td>
<td>11.28</td>
<td>Select areas limited</td>
<td>None</td>
<td>Bearing capacity and quayside length</td>
</tr>
<tr>
<td>Humboldt Marine Terminal</td>
<td>CA</td>
<td>150</td>
<td>703</td>
<td>2</td>
<td>11.6</td>
<td>10.67</td>
<td>Assume &gt; 15</td>
<td>None</td>
<td>Channel depth</td>
</tr>
<tr>
<td>Morro Bay</td>
<td>CA</td>
<td>80</td>
<td>1</td>
<td>5.5</td>
<td>5.5</td>
<td>None</td>
<td>None</td>
<td>None</td>
<td>Laydown area, quayside length, berth/channel depth, and bearing capacity</td>
</tr>
<tr>
<td>San Francisco</td>
<td>CA</td>
<td>870</td>
<td></td>
<td></td>
<td>15.2</td>
<td>15</td>
<td>67</td>
<td></td>
<td>Laydown area, bearing capacity, and air draft</td>
</tr>
<tr>
<td>Oakland</td>
<td>CA</td>
<td>1,300</td>
<td>7,800</td>
<td>185</td>
<td>15</td>
<td>15</td>
<td>67</td>
<td></td>
<td>Bearing capacity and air draft</td>
</tr>
<tr>
<td>Richmond</td>
<td>CA</td>
<td>195</td>
<td>2,350</td>
<td>7</td>
<td>11.5</td>
<td>11.5</td>
<td>67</td>
<td></td>
<td>Bearing capacity and air draft</td>
</tr>
<tr>
<td>Benicia</td>
<td>CA</td>
<td>645</td>
<td>1,550</td>
<td>4</td>
<td>11.5</td>
<td>11.5</td>
<td>67</td>
<td></td>
<td>Bearing capacity and air draft</td>
</tr>
<tr>
<td>Hueneme³⁴</td>
<td>CA</td>
<td>120</td>
<td>800</td>
<td>5</td>
<td>10.5</td>
<td>11</td>
<td>None</td>
<td></td>
<td>Berth depth</td>
</tr>
</tbody>
</table>
OSW Supply Chain Connect

SupplyChainConnect

The Business Network for Offshore Wind Supply Chain Connect allows companies to publicly indicate their interest and ability to supply components and services for U.S. offshore wind projects. It is used as a source for identifying potential recipients of Requests for Proposals (RFPs) as well as identifying local, small, minority-owned, women-owned, and/or veteran-owned businesses for partnership with developers and/or Tier 1 suppliers. Please be sure to complete all fields and regularly update and maintain your organization’s profile.

To register, first gather the information requested to identify the products and services you can provide for offshore wind projects. You’ll have 30 minutes to fill out the form before the system logs you out. Your information will be saved.

COMPANY NAME

EMAIL ADDRESS

☐ I agree to have my information shared with developers and other companies looking for partners. (Required)
John Begala
Vice President, Federal & State Policy

Business Network for Offshore Wind
john@offshorewindus.org