

Offshore Helicopter Services Market Report by Type (Light Helicopters, Medium and Heavy Helicopters), Application (Drilling, Production, Relocation and Decommissioning, and Others), End Use Industry (Oil and Gas Industry, Offshore Wind Power Industry, and Others), and Region 2024-2032

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Abstracts

The global offshore helicopter services market size reached US\$ 2.6 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 3.4 Billion by 2032, exhibiting a growth rate (CAGR) of 2.9% during 2024-2032. The increasing demand for these services in emergencies, the development of infrastructure in remote offshore locations, the rising need for resource extraction and renewable energy projects, the globalization of offshore operations, the rapid advancements in helicopter technology, and the escalating emphasis on safety and environmental regulations in the offshore industry are some of the factors propelling the market growth.

Offshore helicopter services encompass the monitoring and inspection of oil rigs, along with the transportation of both goods and passengers. Various helicopter types, including medium, heavy, and light, are commonly utilized in these operations, serving purposes such as drilling, production, relocation, decommissioning, and transporting supplies and equipment during construction and subsea exploration. The components of offshore helicopter services include a ground station, transceiver, processor, combat cabinet, and power supply. These services play a crucial role in supporting oil and gas rigs and offshore windfarms by delivering essential supplies, conducting medical evacuations, and transporting crew members to platforms. By enhancing operational efficiency, ensuring safety, and improving situational awareness, these services contribute to the reduction of accidents and operational costs.

The global market is majorly driven by the expanding exploration and production activities in offshore oil and gas fields. The global energy demand continues to rise, prompting increased investments in offshore drilling operations. As exploration ventures move into more remote and challenging locations, the need for efficient and reliable transportation, such as offshore helicopter services, becomes paramount. Additionally, the growing offshore wind energy sector contributes significantly to the market's growth. Offshore wind farms, often in locations with limited accessibility, rely on helicopter services for personnel transfers, equipment transportation, and urgent supply deliveries. Furthermore, the increasing trend toward decommissioning aging oil and gas platforms is positively influencing the market. As older installations end their operational life, safe and efficient decommissioning necessitates specialized transport solutions. The versatility of helicopters allows for the swift and secure movement of personnel and equipment during these decommissioning processes. Besides, rapid technological advancements in helicopter capabilities, emphasizing safety, speed, and payload capacity, also foster market growth.

Offshore Helicopter Services Market Trends/Drivers:

Increasing number of offshore renewable energy projects

The escalating number of offshore renewable energy projects is catalyzing the market growth. With a global shift towards sustainable energy solutions, offshore locations have become hotspots for renewable projects, particularly wind energy. Offshore wind farms, characterized by their remote and challenging locations, heavily rely on helicopter services for various critical operations. These include the initial construction phase, where helicopters facilitate the transportation of personnel and equipment to and from offshore platforms. Moreover, as these renewable projects expand, routine maintenance becomes paramount. These helicopter services efficiently transport maintenance crews and the equipment to keep wind turbines and associated infrastructure in optimal condition. The versatility and agility of helicopters enable swift response to maintenance requirements, ensuring the uninterrupted operation of offshore renewable energy installations.

Significant growth across the offshore wind power industry worldwide

The remarkable growth in the global offshore wind power industry is fostering the market. As nations increasingly embrace renewable energy sources, offshore wind projects have substantially expanded. Often situated in remote and challenging offshore locations, these projects heavily depend on helicopter services for essential operations.

Helicopters play a critical role in the installation phase, transporting personnel and equipment to offshore platforms where the construction and assembly of wind turbines occur. Furthermore, ongoing maintenance and inspections become paramount as offshore wind farms multiply. Helicopters offer an agile and efficient means to transport maintenance crews and conduct inspections, ensuring the reliability and performance of the wind turbines. The global rise in offshore wind power installations, driven by environmental concerns and the quest for sustainable energy, creates a sustained demand for these helicopter services. Their ability to provide swift, reliable, and flexible transportation solutions positions them as indispensable assets supporting offshore wind power infrastructure growth and maintenance worldwide.

Rising demand for oil and gas drilling activities

The rising demand for oil and gas drilling activities is bolstering the market. As global energy consumption continues to rise, the exploration and extraction of hydrocarbons from offshore reserves intensify. Helicopters support these endeavors, providing swift and efficient transportation of personnel and essential equipment to and from offshore rigs. Given the often remote and challenging locations of oil and gas fields, helicopters are indispensable assets in overcoming accessibility issues. Moreover, the increasing depth and complexity of offshore drilling operations necessitate specialized transport solutions. Helicopters offer the flexibility to transport crews and equipment swiftly, ensuring timely operations and minimizing downtime. The expansion of oil and gas drilling activities across diverse geographical regions further amplifies the demand for these helicopter services, emphasizing their role as crucial enablers of the offshore energy industry.

Offshore Helicopter Services Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on type, application and end use industry.

Breakup by Type:

Light Helicopters

Medium and Heavy Helicopters

Medium and heavy helicopters accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the

type. This includes light helicopters, and medium and heavy helicopters. According to the report, medium and heavy helicopters represented the largest segment.

The market is experiencing robust growth, with a notable impetus attributed to the increasing demand for medium and heavy helicopters. These two segments are pivotal in enhancing logistical capabilities and operational efficiency in the offshore sector. Medium helicopters, characterized by their versatile and agile nature, are well-suited for transporting personnel and light cargo to offshore installations. Their adaptability allows for efficient maneuvering in diverse offshore environments. As the energy industry expands its offshore operations, the demand for medium helicopters has increased, contributing significantly to the market growth.

On the other hand, heavy helicopters, renowned for their lifting capacity and extended range, are indispensable for transporting heavy equipment and large crews to remote offshore locations. With the growing scale of offshore projects, heavy helicopters have become indispensable, facilitating the movement of essential personnel and equipment to offshore rigs and platforms. As energy exploration ventures into more challenging offshore locations, the demand for these helicopter types is expected to continue driving the market forward, ensuring efficient and timely logistical support for offshore operations.

Breakup by Application:

Drilling

Production

Relocation and Decommissioning

Others

The report has provided a detailed breakup and analysis of the market based on the application. This includes drilling, production, relocation and decommissioning, and others.

Drilling plays a pivotal role in exploring and extracting offshore oil and gas resources. Helicopters are crucial for transporting personnel and essential equipment to drilling rigs in remote offshore locations. As the global energy industry intensifies its efforts in offshore drilling, the demand for helicopter services in drilling has witnessed a significant upswing. This growth is underpinned by the need for swift and reliable transportation, ensuring that skilled personnel and equipment are efficiently mobilized to drilling sites.

In production, helicopters are indispensable for the logistical support required in ongoing offshore production operations. These operations involve the extraction, processing, and transportation of hydrocarbons. Helicopters are crucial for transporting personnel, maintenance crews, and specialized equipment to offshore production platforms. The increasing emphasis on maximizing offshore production efficiency and the geographical challenges posed by remote production sites have fueled the demand for helicopter services in production.

Breakup by End Use Industry:

Oil and Gas Industry
Offshore Wind Power Industry
Others

Oil and gas industry represent the leading market segment

The report has provided a detailed breakup and analysis of the market based on the end use industry. This includes the oil and gas industry, offshore wind power industry, and others. According to the report, the oil and gas industry represented the largest segment.

The oil and gas industry relies extensively on helicopter services for transportation, personnel transfer, and logistical support to offshore installations, such as drilling rigs and production platforms. These helicopters facilitate the swift and efficient movement of workers, engineers, and specialized crews to and from remote offshore locations, overcoming geographical challenges and ensuring the continuous flow of skilled workforce.

In exploration and drilling activities, helicopters are indispensable for transporting personnel, equipment, and supplies to offshore rigs, contributing to the industry's ability to explore and tap into new reserves. Moreover, in the production phase, helicopters are crucial for regularly transporting maintenance teams, supplies, and emergency response personnel to offshore platforms, ensuring the uninterrupted flow of hydrocarbons.

The growing demand for offshore oil and gas extraction, coupled with the expanding geographical reach of exploration and production activities, is propelling the need for reliable and efficient helicopter services. This trend is expected to persist as the global

energy landscape evolves, making the oil and gas industry a key driver of growth in the market.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Europe leads the market, accounting for the largest offshore helicopter services market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Europe accounted for the largest market share.

The European market is characterized by a diverse and dynamic landscape, with several factors contributing to its growth and development. These services are crucial in supporting the oil and gas industry in the North Sea region, which encompasses the United Kingdom, Norway, and the Netherlands. The North Sea is home to numerous offshore drilling rigs and production platforms, and helicopters are vital for personnel transfer, emergency response, and logistical operations. Numerous North Sea installations' harsh and remote nature makes helicopter services essential for efficient operations.

Due to its rich oil and gas reserves, the Norwegian Continental Shelf (NCS) is a particularly active area for offshore helicopter services. As exploration and production activities expand in this region, the demand for helicopter services continues to rise. In Southern Europe, countries such as Italy and Spain contribute to the regional demand for these helicopter services, albeit to a lesser extent than the North Sea region. These services are utilized for various purposes, including personnel transport, medical evacuation, and maintenance support.

The level of offshore oil and gas activities, regulatory frameworks, and technological advancements influence Europe's offshore helicopter services market. The region's commitment to sustainable energy sources and the development of offshore wind farms also contribute to the demand for helicopter services for transportation and logistical support. As the energy landscape evolves and offshore activities expand, the European market for these services is expected to remain dynamic and responsive to industry needs.

Competitive Landscape:

Top companies are strengthening the market through strategic initiatives and service excellence. Often equipped with state-of-the-art medical facilities and a specialized workforce, these companies provide comprehensive healthcare solutions for offshore industries. Their emphasis on safety, medical emergency response, and evacuation preparedness significantly enhances the operational resilience of offshore installations. By tailoring medical services to the unique challenges of remote and offshore environments, these companies contribute to the safety and well-being of personnel working in such conditions. Additionally, their investments in cutting-edge medical technologies, telemedicine capabilities, and efficient evacuation protocols bolster the efficiency and effectiveness of healthcare delivery in these settings. Collaborations with energy companies, regulatory compliance, and adherence to international health and safety standards further position these companies as reliable partners for offshore

operations. The proactive approach to healthcare management in challenging offshore environments mitigates risks. It fosters a conducive working environment, supporting market growth by ensuring the health and safety of offshore employees.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Airbus SE
Bristow Group Inc.
CHC Helicopter
Falcon Aviation Services
Gulf Helicopters
Heligo Charters Pvt. Ltd.
H?li-Union
Leonardo S.p.A
Lockheed Martin Corporation
NHV Group
Omni Helicopters International S.A.
Petroleum Helicopters International Inc

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Recent Developments:

In September 2023, Airbus announced that Lufthansa is set to become its inaugural retrofit customer for the recently introduced Airspace L Bins this year.

In September 2023, Bristow Group Inc. signed an agreement with Volocopter, the pioneer of Urban Air Mobility (UAM), to explore and develop passenger and cargo services for electric vertical takeoff and landing (eVTOL) aircraft in the U.S. and U.K.

In December 2020, H?li-Union signed a contract with Airbus Helicopters to purchase two multi-mission H160s to address various operations.

Key Questions Answered in This Report

1. What was the size of the global offshore helicopter services market in 2023?
2. What is the expected growth rate of the global offshore helicopter services market during 2024-2032?
3. What are the key factors driving the global offshore helicopter services market?
4. What has been the impact of COVID-19 on the global offshore helicopter services

market?

5. What is the breakup of the global offshore helicopter services market based on the type?

6. What is the breakup of the global offshore helicopter services market based on the end use industry?

7. What are the key regions in the global offshore helicopter services market?

8. Who are the key players/companies in the global offshore helicopter services market?

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