

# **Offshore Supply Vessel Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Vessel Type (Anchor Handling Tug Supply Vessel (AHTS), Platform Supply Vessels (PSV), Crew Vessel, Others), By Water Depth (Shallow Water, Deepwater, Ultra Deepwater), By Application (Oil & Gas, Offshore Wind, Patrolling, Research & Surveying, Others), By Region, and By Competition, 2018-2028**

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## **Abstracts**

The Global Offshore Supply Vessels (OSV) market is a vital component of the offshore industry, playing a pivotal role in supporting a wide range of offshore operations. OSVs are specialized vessels designed to transport essential supplies, equipment, personnel, and drilling fluids to offshore installations, including oil and gas platforms, drilling rigs, and renewable energy facilities. These vessels ensure the smooth and efficient functioning of offshore activities, making them indispensable assets in remote and challenging maritime environments.

The dominance of the OSV market is driven by its crucial role in the oil and gas sector, where it facilitates exploration, production, maintenance, and decommissioning operations. The sustained demand for OSVs is underscored by ongoing efforts to access new hydrocarbon reserves and maximize production from existing fields. Furthermore, OSVs have adapted to support deepwater and ultra-deepwater operations, incorporating advanced technology and equipment to address the challenges posed by these environments.

Apart from the oil and gas industry, OSVs are increasingly contributing to offshore

renewable energy projects, particularly offshore wind farms. Their versatility, adaptability, and global reach position them as essential vessels for the construction, maintenance, and servicing of these renewable energy installations.

In addition to their role in offshore energy, OSVs play a significant part in infrastructure maintenance, supporting routine inspections, repairs, and upkeep of offshore platforms, pipelines, and subsea installations. Their continuous technological advancements, including dynamic positioning systems and safety enhancements, further solidify their dominance in the market.

As the offshore industry continues to evolve and expand into new regions and sectors, OSVs remain integral to its success. Their adaptability, efficiency, and critical support functions make them indispensable assets, ensuring the reliability and longevity of offshore installations worldwide. The OSV market's future is expected to be shaped by ongoing technological innovations, regulatory developments, and the dynamic landscape of offshore energy exploration and production.

## Key Market Drivers

### Offshore Renewable Energy Expansion:

The global transition to renewable energy sources, particularly offshore wind and tidal energy, is a major driver fueling the growth of the OSV market. As countries worldwide commit to reducing greenhouse gas emissions and diversifying their energy portfolios, offshore renewable energy projects are experiencing substantial growth.

Offshore wind farms, in particular, require a fleet of specialized OSVs to support various phases of their lifecycle, including transportation of turbine components, installation, maintenance, and crew transfer. The development of offshore wind energy hubs, such as those in the North Sea and along the US East Coast, is driving the demand for OSVs equipped with the necessary capabilities and equipment to operate efficiently in challenging offshore environments.

The increasing global focus on renewable energy is expected to sustain robust growth in the OSV market for years to come, with companies investing in specialized vessels and technologies to support these offshore projects.

### Expanding Offshore Oil and Gas Activities:

Despite the growing interest in renewable energy, offshore oil and gas exploration and production (E&P) activities remain a significant driver of the OSV market. Offshore reserves continue to play a vital role in meeting global energy demand, and companies are investing in offshore drilling and production projects to tap into these valuable resources.

Offshore E&P activities, whether in shallow or deepwater regions, require a wide range of OSVs, including anchor handling tug supply (AHTS) vessels, platform supply vessels (PSVs), and crew transfer vessels. These vessels provide critical support for drilling operations, subsea installations, and the transportation of personnel and equipment.

As oil prices stabilize and the demand for hydrocarbons remains steady, offshore E&P activities are projected to recover, contributing to sustained demand for OSVs in this segment.

#### Offshore Decommissioning and Maintenance:

Aging offshore infrastructure, including platforms, pipelines, and subsea equipment, presents a growing need for offshore decommissioning and maintenance activities. As offshore assets reach the end of their operational life cycles, they must be decommissioned safely and efficiently.

OSVs play an essential role in decommissioning projects by providing transportation, heavy lifting, and equipment deployment capabilities. Additionally, regular maintenance and inspection of offshore installations require OSVs equipped with specialized crew and equipment to ensure safe and reliable operations.

The decommissioning and maintenance segment is expected to witness substantial growth, creating opportunities for OSV operators to diversify their service offerings and fleet capabilities.

#### Technological Advancements and Fleet Modernization:

Technological innovations are driving the OSV market forward by enhancing vessel performance, safety, and efficiency. Advanced vessel designs, propulsion systems, and automation technologies are becoming increasingly prevalent in the industry.

Dynamic positioning systems, which enable vessels to maintain precise positions without anchoring, are crucial for various offshore operations and are standard features

on many OSVs. Additionally, the integration of digitalization, Internet of Things (IoT) sensors, and data analytics allows for real-time monitoring, predictive maintenance, and optimized vessel performance.

Vessel owners are investing in fleet modernization to stay competitive, improve fuel efficiency, and reduce emissions. This trend is driven by environmental regulations and the industry's commitment to sustainability.

#### Expanding Geographical Frontiers:

The OSV market is expanding into new geographical frontiers as offshore activities move into deeper waters and more challenging environments. Deepwater oil and gas reserves and emerging offshore renewable energy projects in regions such as Asia-Pacific, South America, and Africa are driving the need for specialized OSVs capable of operating in extreme conditions.

As exploration and production efforts extend into remote and harsh environments, OSV operators are investing in vessels equipped with ice-class capabilities, enhanced stability, and advanced navigation systems to meet the unique challenges of these areas.

The global reach of offshore activities underscores the significance of geographical expansion as a driver of the OSV market's growth, as it opens up new markets and opportunities for industry players.

#### Key Market Challenges

##### Volatility in Oil and Gas Prices:

One of the most enduring challenges in the OSV market is the volatility of oil and gas prices. The fortunes of the OSV industry are closely tied to the health of the offshore oil and gas exploration and production (E&P) sector. When oil prices are high, there is increased investment in offshore drilling and production activities, leading to higher demand for OSVs. Conversely, during periods of low oil prices, E&P companies cut back on spending, which can result in a significant reduction in OSV utilization rates and day rates.

The OSV market is highly cyclical, and companies operating in this sector must navigate through these price fluctuations. Proactive fleet management, diversification

into other sectors such as offshore renewables, and cost-effective operations are strategies that OSV operators employ to mitigate the impact of oil price volatility.

#### Overcapacity and Oversupply:

The OSV industry has faced a persistent challenge of overcapacity and oversupply of vessels, particularly in the aftermath of the 2014 oil price crash. During the previous boom years, many shipowners invested heavily in expanding their OSV fleets to meet the growing demand. However, this resulted in a surplus of vessels when the market downturn occurred.

The oversupply issue led to intense competition among OSV operators, which in turn put downward pressure on day rates and profit margins. To address this challenge, companies have resorted to vessel scrapping, cold stacking (mothballing), and asset divestment to reduce excess capacity and stabilize market conditions.

#### Regulatory Compliance and Environmental Standards:

Increasingly stringent environmental regulations and standards are a growing challenge for the OSV industry. As governments and international bodies place greater emphasis on reducing greenhouse gas emissions and protecting marine ecosystems, OSV operators are required to invest in cleaner and more fuel-efficient technologies.

Compliance with emissions regulations, such as sulfur and nitrogen oxide limits, necessitates the retrofitting of vessels with exhaust gas cleaning systems (scrubbers) or transitioning to alternative fuels like liquefied natural gas (LNG). Ensuring safe waste disposal and preventing oil spills also requires adherence to strict environmental protocols, adding to operational complexities and costs.

#### Technological Advancements and Digitalization:

While technology offers significant opportunities for improving efficiency and safety, it also presents challenges in terms of keeping pace with rapid advancements. OSV operators must continually invest in modernizing their fleets to remain competitive. This involves incorporating the latest navigation, communication, and automation technologies to enhance vessel performance and safety.

Digitalization, including the use of data analytics, Internet of Things (IoT) sensors, and remote monitoring, offers opportunities for optimizing vessel operations and reducing

downtime. However, the adoption of these technologies also requires substantial investments in infrastructure, data security, and crew training.

#### Geopolitical and Geographical Considerations:

The OSV market's global nature introduces geopolitical and geographical challenges. Operators must contend with varying regulatory frameworks, taxation, and legal requirements in different regions. Geopolitical tensions and conflicts can disrupt operations and impact vessel deployment in certain areas.

Moreover, the geographic spread of offshore oil and gas reserves and renewable energy projects means that OSV operators must maintain a global presence, which involves managing diverse and sometimes challenging operating environments.

#### Key Market Trends

##### Transition to Renewable Energy and Offshore Wind Farms:

The global OSV market is witnessing a significant trend towards supporting renewable energy projects, particularly offshore wind farms. As countries around the world commit to reducing carbon emissions and transitioning to cleaner energy sources, offshore wind energy has gained substantial momentum. OSVs play a crucial role in these projects, providing logistics, transportation, installation, and maintenance services for offshore wind turbines and related infrastructure.

Offshore wind farms require a fleet of specialized OSVs, including crew transfer vessels, installation vessels, and maintenance vessels, to support their operations. This trend is driving the demand for technologically advanced OSVs equipped with the latest equipment for efficient and safe offshore wind farm operations. The growth of this segment is expected to continue as more countries invest in offshore wind energy projects.

##### Focus on Energy Efficiency and Environmental Sustainability:

Another notable trend in the OSV market is the growing emphasis on energy efficiency and environmental sustainability. With increasing regulations and environmental awareness, there is a strong push for OSVs to adopt cleaner technologies and reduce their carbon footprint. This includes the use of eco-friendly propulsion systems, such as LNG or hybrid systems, and the implementation of energy-efficient designs to minimize



fuel consumption.

Shipowners and operators are investing in retrofitting existing vessels and building new, environmentally friendly OSVs to meet stringent emission standards. Additionally, the adoption of exhaust gas cleaning systems (scrubbers) to reduce air emissions is becoming more common in the industry.

#### Digitalization and Automation for Enhanced Operations:

The OSV industry is embracing digitalization and automation to improve operational efficiency and safety. Advancements in technology, including the Internet of Things (IoT), data analytics, and remote monitoring, are enabling shipowners to optimize vessel performance, reduce downtime, and enhance crew safety.

Automation solutions, such as dynamic positioning systems and autonomous vessels, are being explored to improve vessel positioning and reduce human error during offshore operations. Digital twin technology is also gaining traction, allowing real-time monitoring and simulation of vessel systems for predictive maintenance and performance optimization.

#### Offshore Exploration and Production (E&P) Recovery:

The OSV market is closely tied to offshore oil and gas exploration and production activities. While there has been a temporary setback due to fluctuations in oil prices and reduced investments in offshore E&P, there is a trend towards recovery. As oil prices stabilize and demand for hydrocarbons remains robust, offshore drilling activities are expected to rebound.

This recovery is driving the demand for OSVs to support offshore drilling rigs, platforms, and subsea operations. OSVs equipped with advanced equipment, such as subsea robots and remotely operated vehicles (ROVs), are becoming essential for exploration and production activities in deeper and more challenging offshore environments.

#### Rationalization and Fleet Modernization:

To adapt to changing market dynamics, shipowners and operators in the OSV market are rationalizing their fleets and focusing on modernization. This trend involves retiring older vessels that may be less fuel-efficient or environmentally compliant and investing in new, high-tech OSVs that meet current industry standards.

Rationalization efforts also include divesting non-core assets and consolidating operations to achieve economies of scale and reduce operating costs. Shipowners are increasingly opting for standardized vessel designs to streamline maintenance and reduce spare parts inventory. This trend aims to enhance the overall competitiveness and sustainability of OSV companies in a challenging market environment.

## Segmental Insights

### Vessel Type Insights

Platform Supply Vessels (PSV) segment dominates in the global offshore supply vessel market in 2022. PSVs are highly versatile vessels designed to support a wide range of offshore operations. They excel in transporting essential supplies, equipment, and personnel to offshore oil and gas platforms, drilling rigs, and production facilities. PSVs are equipped with spacious cargo holds and advanced loading systems, making them capable of carrying various types of cargo, including drilling fluids, chemicals, and consumables. This adaptability allows PSVs to serve diverse offshore projects and meet evolving client requirements.

One of the distinguishing features of PSVs is their significant cargo-carrying capacity. They are equipped with storage tanks, which can accommodate substantial quantities of bulk materials, containers, and fuel. This high cargo capacity enables efficient logistics, reducing the need for frequent resupply trips and optimizing offshore operations.

Many modern PSVs are equipped with advanced Dynamic Positioning Systems (DPS), which enable precise vessel positioning without the need for anchors. DPS enhances safety during cargo transfer and offshore operations, especially in challenging weather conditions. This technology allows PSVs to maintain their positions relative to offshore installations, ensuring the smooth and safe transfer of cargo and personnel.

### Water Depth Insights

Shallow Water segment dominates in the global offshore supply vessel market in 2022. Shallow water regions, typically defined as water depths up to 200 meters (approximately 656 feet), are home to a substantial portion of the world's offshore hydrocarbon reserves. These reserves are relatively accessible compared to deeper water depths, making them economically attractive for exploration and production activities. As a result, the demand for OSVs in shallow water regions is consistently high



due to ongoing oil and gas operations.

Many shallow water regions, such as the Gulf of Mexico, the North Sea, and various coastal areas, have well-established offshore infrastructure, including drilling platforms, production facilities, and pipelines. These assets require continuous maintenance, supply, and personnel transfer, driving the demand for OSVs to provide essential support services. The existing infrastructure in shallow water regions ensures a steady need for OSV services.

Shallow water OSVs are versatile vessels capable of performing a wide range of tasks. They are equipped for transporting cargo, drilling fluids, equipment, and personnel to offshore installations. Their adaptability allows them to cater to various offshore activities, including drilling, production, maintenance, and well intervention. This versatility enhances their market dominance as they can serve multiple functions within the offshore industry.

## Regional Insights

North America dominates the Global Offshore Supply Vessel Market in 2022. North America boasts proximity to significant offshore energy reserves, particularly in the Gulf of Mexico. The region's extensive network of offshore oil and gas platforms and exploration activities has been a driving force behind the demand for OSVs. These vessels are essential for transporting personnel, equipment, and supplies to and from offshore rigs and platforms, making them a critical component of the energy supply chain.

North America is home to some of the world's most advanced shipbuilding and maritime technology companies. The region has a strong tradition of innovation in vessel design and construction, including the development of specialized OSVs tailored to the unique requirements of offshore operations. This technological advantage positions North American OSV operators at the forefront of the global market, offering cutting-edge vessels with high efficiency and safety standards.

North America has well-established regulatory frameworks and safety standards governing offshore operations. Stringent safety regulations, environmental compliance, and high standards for vessel construction and operation have fostered a culture of safety and reliability in the region's OSV industry. This reputation for adhering to best practices and safety measures has earned the trust of international clients and contributed to the dominance of North American OSV companies.

## Key Market Players

Bourbon Corporation SA

Tidewater Inc.

Solstad Farstad

Maersk Supply Service A/S

Edison Chouest Offshore

Seacor Marine Holdings Inc.

Abdon Callais Offshore LLC

Swire Pacific Offshore

DOF ASA

PACC Offshore Services Holdings Ltd.

## Report Scope:

In this report, the Global Offshore Supply Vessel Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Offshore Supply Vessel Market, By Vessel Type:

Anchor Handling Tug Supply Vessel (AHTS)

Platform Supply Vessels (PSV)

Crew Vessel

Others

### Offshore Supply Vessel Market, By Water Depth:

Shallow Water

Deepwater

Ultra Deepwater

### Offshore Supply Vessel Market, By Application:

Oil & Gas

Offshore Wind

Patrolling

Research & Surveying

Others

### Offshore Supply Vessel Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

South America

Brazil

Argentina

Colombia

Asia-Pacific

China

India

Japan

South Korea

Australia

Middle East & Africa

Saudi Arabia

UAE

South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Offshore Supply Vessel Market.

Available Customizations:

Global Offshore Supply Vessel Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

Detailed analysis and profiling of additional market players (up to five).

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  - 15.8.1. Business Overview
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