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# Pipe Laying Vessels Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Installation (J-lay Barges, S-lay Barges, Reel Barges), By Positioning System (Anchor System, Dynamic Positioning System), By Depth (Shallow Water, Deep Water), By Region & Competition, 2021-2031F

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## Abstracts

The Global Pipe Laying Vessels Market is projected to expand significantly, rising from USD 3.67 Billion in 2025 to USD 6.13 Billion by 2031, demonstrating an 8.93% compound annual growth rate. These specialized maritime assets are crucial for the subsea installation of pipelines, which link offshore oil and gas facilities to onshore processing hubs. Key growth drivers include the increasing worldwide energy demand, spurring deep-water exploration, and the extensive development of offshore wind farms, which require complex cabling and pipeline infrastructure. Additionally, the ongoing need to upgrade or replace existing subsea networks in mature basins consistently drives demand for these vessels, independent of broader technological advancements. Safety complexity and operational risks inherent to harsh offshore environments present a notable challenge to market expansion, potentially leading to project delays and higher insurance costs. While maintaining strict safety standards is paramount, it remains difficult in unpredictable conditions. The International Marine Contractors Association (IMCA) reported in 2025 that line of fire incidents continued to be a significant concern, accounting for 52% of all lost time injuries among marine contractor members in the preceding year, underscoring persistent difficulties in mitigating hazardous occurrences despite advanced protocols.

### Market Driver

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The increasing pace of offshore oil and gas production worldwide is a primary driver for the deployment of pipe laying vessels. As major energy companies approve new deep-water projects to secure reserves, there is a growing need for highly specialized vessels capable of installing rigid and flexible flowlines in complex subsea conditions. This resurgence in exploration and production activities directly increases the utilization rates of the global vessel fleet, as contractors must deploy these assets to meet engineering, procurement, construction, and installation requirements. The strength of this demand is reflected in the financial performance of leading industry players operating these specialized vessels; for instance, TechnipFMC's October 2024 'Third Quarter 2024 Earnings Release' indicated subsea inbound orders reached $2.5 billion, highlighting sustained momentum in project awards that demand extensive vessel operations for resource extraction infrastructure. Concurrently, the expansion of offshore wind and other renewable energy projects offers a distinct yet complementary growth opportunity for the market. These green initiatives necessitate vessels for installing vast inter-array and export cable networks, frequently employing modified pipe laying equipment or similar operational methods. The global push for decarbonization is catalyzing substantial infrastructure investments that heavily depend on maritime construction support to link offshore generation sites to national grids. According to the Global Wind Energy Council’s June 2024 'Global Offshore Wind Report 2024', the industry is forecasted to install 410 GW of new offshore wind capacity over the next decade, ensuring sustained demand for subsea installation services. This dual demand from both the fossil fuel and renewable energy sectors reinforces the financial stability of vessel operators, with Subsea7 reporting an $11.3 billion backlog in 2024, indicative of a robust pipeline of projects for major marine contractors.

**Market Challenge**

The inherent operational risks and complex safety requirements associated with working in demanding offshore environments pose a significant impediment to the growth of the Global Pipe Laying Vessels Market. Projects situated in deep-water basins or areas prone to volatile weather are inherently unpredictable, frequently resulting in unavoidable operational stoppages. These interruptions directly inflate project costs through extended vessel charter periods and necessitate higher insurance premiums to cover potential liabilities. Consequently, the financial uncertainty stemming from these hazardous conditions leads operators to exercise caution, as the substantial capital required to manage safety risks and potential delays significantly reduces profit margins and deters investment in new, capital-intensive vessel deployments. The ongoing presence of these operational hazards is evident in recent industry

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performance data, which highlights the difficulty in maintaining accident-free environments despite well-established protocols. The International Marine Contractors Association (IMCA) reported that in 2024, the Total Recordable Injury Rate (TRIR) rose to 1.1 incidents per million hours worked, indicating an overall increase in operational incidents compared to the previous year. This rising frequency of recordable injuries compels marine contractors to allocate considerable resources toward liability management and emergency response planning. As a result, the financial burden of compliance and the risk of safety-related project delays restrict the capital available for fleet expansion, thereby hindering overall market growth.

## Market Trends

The adaptation of vessel fleets for Carbon Capture and Storage (CCS) projects is actively transforming the market as operators deploy assets to construct infrastructure for decarbonization efforts. Unlike traditional extraction projects, CCS initiatives utilize pipe laying vessels to install specialized flowlines for transporting dense-phase carbon dioxide, generating a new revenue stream driven by climate policy rather than global energy demand. This strategic shift enables contractors to repurpose high-specification assets for large-scale abatement schemes, effectively diversifying their operational portfolios beyond conventional fossil fuels. For example, Subsea7’s March 2025 press release confirmed its selection to execute the engineering, procurement, construction, and installation of a five-kilometer CO2 pipeline for Norway's Northern Lights Phase 2 project, validating the sector's pivot toward supporting emerging energy value chains. Simultaneously, advancements in automated pipe handling and welding systems are significantly enhancing fleet efficiency by accelerating cycle times and reducing the need for manual intervention. Operators are retrofitting vessels with upgraded onboard factories to ensure consistent weld quality and achieve higher lay rates, which are critical for mitigating risks and costs in challenging offshore environments. These automated improvements streamline production processes, directly decreasing the operational time required per kilometer of installed infrastructure. Allseas’ February 2025 announcement, detailing the 'First contract award for Solitaire double joint factory upgrade,' highlighted the company's commitment to a major modernization of its vessel Solitaire through the installation of state-of-the-art automated handling equipment, aiming to further improve the performance of a system that has historically processed over 13,000 kilometers of pipe.

## Key Market Players

Allseas Group SA

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CIMIC Group Ltd.

Hanwha Corp.

Havila Shipping ASA

Helix Energy Solutions Group Inc.

Hyundai Heavy Industries Group

John Swire and Sons Ltd.

McDermott International Ltd.

**Report Scope**

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

Pipe Laying Vessels Market, By Installation

J-lay Barges

S-lay Barges

Reel Barges

Pipe Laying Vessels Market, By Positioning System

Anchor System

Dynamic Positioning System

Pipe Laying Vessels Market, By Depth

Shallow Water

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Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

**Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Pipe Laying Vessels Market.

**Available Customizations:**

Global Pipe Laying Vessels Market report with the given market data, TechSci 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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