

South America Offshore Helicopter Services Market - Growth, Trends, and Forecasts (2023 - 2028)

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Report description:

The South American offshore helicopter services market is expected to register a CAGR of 2% during the forecast period.

The market was negatively impacted by the COVID-19 pandemic in 2020. However, the market has now reached pre-pandemic levels.

Factors, such as an increase in oil and gas exploration in deep water and subsea wind power installation, are expected to drive the South American offshore helicopter services market's growth during the forecast period. However, advancements in technologies, such as automated drilling rigs, are expected to affect the market's growth as the number of trips made by helicopters offshore decreases. Nevertheless, the increasing offshore wind installation in Brazil is expected to create an opportunity for the South American offshore helicopter services market in the future.

Due to its numerous offshore projects, Brazil is expected to be the largest offshore helicopter service in South America.

South America Offshore Helicopter Services Market Trends

Oil and Gas Segment Expected to Dominate the Market

The offshore activities directly influence the South American offshore helicopter services market. After oil prices fell in 2014, many countries shifted toward onshore projects. However, it turned out that the return investment period of onshore projects is 10 to 15 years. Countries such as Brazil started deepwater and ultra-deep-water explorations, which are more profitable and have a return investment period of five to six years. The above cost of oil rigs also declined, attracting more investment in offshore oil and gas.

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The Libra oil field in Santos Basin in Brazil is an ultra-deep-water basin and is the largest oil field in Brazil. The field was expected to be completed in 2021. The development phase required some transportation facilities; this is where offshore helicopter services came into play. This project is expected to boost the growth of the South American offshore helicopter services market during the forecast period.

As of November 2022, the total supply of offshore rigs in South America was 39 units, of which the amount of marketed and contracted rigs was 35. The increase in deepwater exploration in remote areas with harsh environments has resulted in the rise in the use of premium quality drilling equipment, driving the growth of the market studied. The Gulf of Mexico is one of the major offshore deepwater reserves, which is expected to witness an upsurge in production during the forecast period. In October 2022, ExxonMobil announced two discoveries at the Sailfin-1 and Yarrow-1 wells in the Stabroek block offshore Guyana, adding to its extensive portfolio of development opportunities. The growing oil and gas discoveries are expected to drive the growth of offshore helicopter services across the region.

Therefore, oil and gas offshore projects in South America are expected to increase the demand for offshore helicopters in the region during the forecast period.

Brazil to Dominate the Market

Brazil has dominated the helicopter services market in the past. The country is expected to dominate the market studied during the forecast period due to several ongoing and upcoming offshore activities.

In 2021, the country produced 2.99 million barrels per day of crude oil, which is comparatively higher than the 2.53 mbpd generated in 2015. The discoveries of large, offshore, pre-salt oil deposits have transformed Brazil into a top-10 petroleum liquid fuels producer, which supports the growth of helicopter services across the country.

In November 2022, China National Petroleum Corp and Petrobras completed their first oil exploration test of a deepwater field in Brazil's Santos basin. Well Gura-1, a large oil field in the Santos basin, represents a significant accomplishment in CNPC's foreign deepwater oil and gas exploration. In January 2022, Brazilian oil and gas company Enauta signed agreements with Altera to extend the charter, operation, and maintenance of Petrojarl I FPSO for the Early Production System (EPS) of the Atlanta field located offshore Brazil. Located in the Santos Basin, the Atlanta field is operated by Enauta Energia, a wholly-owned subsidiary of the company. The region has several upcoming offshore wind energy projects. For instance, BlueFloat has nearly 15 GW of offshore wind energy projects in Brazil, which are anticipated to have offshore helicopter service in the coming years.

Hence, with upcoming offshore oil and gas and wind energy projects, offshore helicopter service in Brazil is expected to dominate the market during the forecast period.

South America Offshore Helicopter Services Market Competitor Analysis

The South American offshore helicopter services market is moderately consolidated. Some key players in this market (in particular order) are Airbus Group SE, Leonardo SpA, Lockheed Martin Corporation, Bristow Group Inc., and CHC Helicopter.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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