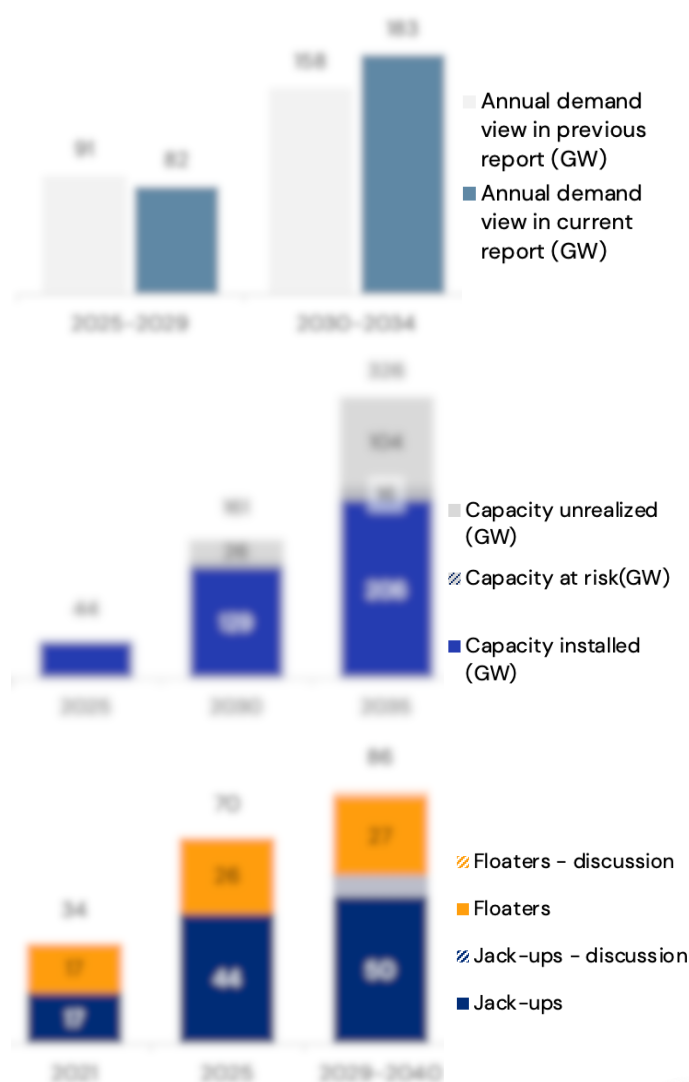# Offshore Wind Installation Forecast Analysis & Report

About

Spinergie developed a granular, bottom-up offshore wind forecast, confronting demand with heavy lift vessel supply. The results are packaged in a 40+-page report that provides an in-depth analysis of the global bottom-fixed offshore wind installation market, excluding China. The report examines key trends, growth projections, and challenges, focusing on the dynamics of installation vessel supply and demand. Spinergie's report also covers developments in turbine and foundation sizes and types, heavy lift vessel requirements, and detailed fleet analysis. It includes forecasts and bottlenecks for installation capacity through 2040, offering strategic insights for industry stakeholders. The release schedule includes two publications a year, in February and July.

Additionally, Spinergie provides forecast consultancy to help stakeholders explore tailored scenarios.

Executive Summary

Demand Analysis

This report analyzes key trends shaping offshore wind demand, offering a country-by-country assessment of market developments. It covers delays, regulatory changes, and technological evolutions, including turbine size, foundation types, bottom-fixed and floating projects, to provide a clear and realistic demand outlook through 2040.

Installation Vessel Supply

The shortage of heavy lift vessels, both for turbine installation (WTIV) and foundation installation (FIV), is thoroughly examined. The report analyzes the current and future fleet, highlighting key KPIs such as utilization and operational efficiency to assess supply capacity now and in the years ahead. Special attention is given to newbuilds, exploring the characteristics of tomorrow's vessels and how current market dynamics influence new orders.

To Go Further

The report also investigates key offshore wind bottlenecks, including heavy O&M, cable installation, financial mechanisms, repair strategies, and supply chain limitations, offering a comprehensive overview of the challenges currently facing the market.

Report Content

Demand

Market outlook

- Market commentary, strategic outlook, and current trends
- Offshore wind demand detail per region and regional growth trends

Bottom-fixed demand analysis

- Foundation types and size evolution
- Future WTG sizes and new models coming to the market

Supply

Fleet analysis

- Fleet segmentation, main purpose specialization
- Utilization analysis per category of vessels and forward-looking utilization
- Installation capabilities in categories of turbine size and foundation weight
- Current delivery pipeline and potential newbuilds intel

Supply-Demand Comparison

Gap analysis

- Impact on installed capacity and annual bottleneck
- Future O&M pressure on WTIV fleet

Our Analysts

Yvan Gelbart
Lead Analyst, Spinergie

Yvan Gelbart is a Lead Data Analyst specializing in data analytics and business intelligence in the offshore wind industry. Yvan joined Spinergie, a maritime technology company, in 2019. He holds an MBA in Management from Sorbonne Business School and an MSc in Oil and Gas Engineering from Institut Polytechnique UniLaSalle. Yvan's research involves econometric models for supply and demand in the offshore installation sector, predictive forecasts, and weather downtime analysis using geospatial data.

Maëlig Gaborieau
Senior Offshore Wind Analyst, Spinergie

Maëlig Gaborieau is a Senior Offshore Wind Analyst at Spinergie with over three years working on energy and maritime related topics. His track record includes a published scientific paper, participation to several conferences as a speaker (Wind Europe, World Forum for Offshore Wind), webinars and numerous reports. Maëlig holds an MSc in Maritime Energy from Centrale Nantes, and an MSc in Industrial Engineering and Management from the Technical University of Denmark.

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