

Global Bonded Marine Flexible Pipeline Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Bonded Marine Flexible Pipeline market size is expected to reach \$ 1802 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Bonded marine flexible pipeline refers to multilayer bonded flexible pipe or hose assemblies used for offshore oil and gas production, export, injection, loading, discharge and subsea connections. They typically consist of an inner liner, rubber or polymer matrix, steel or textile reinforcement layers, outer cover and end fittings. The functional layers are bonded into an integrated structure through vulcanization, adhesion or composite processing, and are mainly used in floating hoses, submarine hoses, flexible jumpers, selected flowlines, risers and offshore loading or discharge hoses.

The upstream supply chain includes synthetic rubber compounds, HNBR/NBR/EPDM materials, UPE/PTFE/PA liners, copper-plated steel wires, spring steel wires, polyester or aramid fabrics, flanges, end fittings, seals, buoyancy materials, bend restrictors, bend stiffeners and testing equipment. Downstream demand comes from FPSO, FSO, SPM/CALM buoy systems, subsea production systems, offshore loading terminals, oil and gas operators and offshore EPC contractors.

In 2025, global bonded marine flexible pipeline production reached approximately 4,500 km, with an average global market price is \$250 per meter.

From a global industry perspective, bonded marine flexible pipeline is a mature product type within offshore oil and gas hose and flexible pipeline systems, particularly suitable for offshore loading hoses, floating hoses, submarine hoses, jumper connections,

injection lines and medium-/low-pressure or selected high-pressure fluid-transfer applications. API 17K applies to bonded flexible pipe assemblies with end fittings, covering both static and dynamic flexible pipes used as flowlines, risers, jumpers, and offshore loading and discharge hoses; the covered media include oil, gas, water and injection chemicals, including sweet and sour service conditions. Compared with non-bonded flexible pipes, the defining feature of bonded structures is that functional layers are bonded or vulcanized into an integrated body, with limited relative movement between layers, supporting strong sealing integrity, structural continuity and external abrasion resistance. However, their design logic differs from non-bonded systems in areas such as deepwater dynamic fatigue, interlayer stress release and complex-load adaptability. Compared with TCP or RTP products, bonded marine flexible pipelines are closer to conventional rubber or elastomer-based offshore hose systems, with higher engineering maturity in established applications, while lightweighting and long-term material behaviour must still be qualified for specific operating conditions.

In terms of industry trends, bonded marine flexible pipelines are moving toward higher pressure capability, corrosion resistance, fatigue resistance, longer service life, lighter structures, more reliable end fittings and standardized qualification. Traditional bonded offshore hoses emphasized oil resistance, seawater resistance, abrasion resistance, flexibility and external environmental durability. As offshore operations extend toward deeper water, floating production, marginal fields and more complex fluid-transfer requirements, product design increasingly focuses on interlayer bonding strength, reinforcement architecture, liner-media compatibility, outer-cover weatherability, rapid gas decompression resistance, dynamic bending fatigue and end-fitting sealing reliability. API 17K specifies minimum requirements for design, material selection, manufacturing, testing, marking and packaging of bonded flexible pipes, indicating that competition in this category is no longer limited to manufacturing capability, but increasingly depends on standards compliance, qualification testing, service-condition matching and long-term reliability.

The main growth drivers come from three areas. First, offshore oil and gas production, offshore loading and discharge, floating production facilities and subsea connection systems continue to require pipeline solutions that are flexible, corrosion resistant, quickly connectable and able to accommodate marine motion. Second, aging offshore assets, replacement needs and marginal-field development are pushing customers to place greater emphasis on installation convenience, fatigue life, end-fitting reliability and lifecycle cost. Third, rising offshore safety and environmental requirements are forcing pipeline products to improve sealing performance, media resistance, abrasion

resistance, fatigue performance and failure-risk control. Overall, Bonded Marine Flexible Pipeline should not be viewed simply as an offshore version of ordinary rubber hose, but as a multilayer bonded pipeline system engineered for marine dynamic environments, oil and gas fluid transfer, loading and discharge operations, and long-term reliable service.

This report studies the global Bonded Marine Flexible Pipeline production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Bonded Marine Flexible Pipeline and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Bonded Marine Flexible Pipeline that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Bonded Marine Flexible Pipeline total production and demand, 2021-2032, (K Meter)

Global Bonded Marine Flexible Pipeline total production value, 2021-2032, (USD Million)

Global Bonded Marine Flexible Pipeline production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Meter), (based on production site)

Global Bonded Marine Flexible Pipeline consumption by region & country, CAGR, 2021-2032 & (K Meter)

U.S. VS China: Bonded Marine Flexible Pipeline domestic production, consumption, key domestic manufacturers and share

Global Bonded Marine Flexible Pipeline production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Meter)

Global Bonded Marine Flexible Pipeline production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Meter)

Global Bonded Marine Flexible Pipeline production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Meter)

This report profiles key players in the global Bonded Marine Flexible Pipeline market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Continental Group, Flexomarine, Trelleborg, Yokohama, Yuelong Technology, ALFAGOMMA, Techfluid, MAN Oil &

Marine, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Bonded Marine Flexible Pipeline market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Meter) and average price (US\$/Meter) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Bonded Marine Flexible Pipeline Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Bonded Marine Flexible Pipeline Market, Segmentation by Type:

Floating Hoses

Submarine Hoses

Flexible Jumpers

Others

Global Bonded Marine Flexible Pipeline Market, Segmentation by Carcass Design:

Single Carcass Pipeline

Dual Carcass Pipeline

Global Bonded Marine Flexible Pipeline Market, Segmentation by Structure:

Steel Cable Reinforced Pipeline

Textile Reinforced Pipeline

Global Bonded Marine Flexible Pipeline Market, Segmentation by Application:

Oil and Gas

Marine Renewable Energy

Other

Companies Profiled:

Continental Group

Flexomarine

Trelleborg

Yokohama

Yuelong Technology

ALFAGOMMA

Techfluid

MAN Oil & Marine

Key Questions Answered:

1. How big is the global Bonded Marine Flexible Pipeline market?
2. What is the demand of the global Bonded Marine Flexible Pipeline market?
3. What is the year over year growth of the global Bonded Marine Flexible Pipeline market?
4. What is the production and production value of the global Bonded Marine Flexible Pipeline market?
5. Who are the key producers in the global Bonded Marine Flexible Pipeline market?
6. What are the growth factors driving the market demand?

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