

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

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Abstracts

The global Flexible Pipeline System market size is expected to reach \$ 5619 million by 2032, rising at a market growth of 5.4% CAGR during the forecast period (2026-2032).

Flexible Pipeline System refers to bendable pipe assemblies used for oil and gas, offshore engineering, water or gas injection, produced-water transfer, CO₂ transportation and special fluid transfer applications. A typical system consists of an inner liner, reinforcement layers, outer cover, end fittings and connection accessories, and may adopt unbonded, bonded, thermoplastic composite, reinforced thermoplastic or steel-reinforced structures. Its core function is to provide safe fluid transportation under corrosive, high-pressure, bending, dynamic-loading or fast-installation conditions, serving onshore gathering lines, subsea flowlines, deepwater risers, jumpers, injection lines and offshore transfer systems.

The upstream supply chain includes HDPE, PEX, PA, PVDF, PEEK and other thermoplastic liners, synthetic rubber compounds, glass fiber, aramid fiber, carbon fiber, polyester fiber, steel wire or steel strip reinforcement, end fittings, flanges, seals, connectors, buoyancy modules, bend restrictors and testing equipment. Downstream demand comes from onshore oilfields, shale oil and gas, offshore developments, FPSO/FSO systems, subsea production systems, water or gas injection, produced-water management, CO₂ reinjection and offshore loading terminals.

In 2025, global flexible pipeline system production reached approximately 9,000 km, with an average global market price is \$400 per meter.

From a global industry perspective, flexible pipeline systems have evolved from conventional hoses or standalone flexible pipes into system-level fluid-transport

solutions for complex operating conditions. Their core value lies in using flexible structures, end connections, dynamic adaptability and media-resistant materials to overcome limitations of rigid steel pipes in complex routing, vibration and displacement, corrosive media, fast installation and restricted construction environments. By structural route, flexible pipeline systems may include unbonded flexible pipes, bonded flexible pipes, thermoplastic composite pipes, reinforced thermoplastic pipes and selected industrial flexible transfer lines. API 17J covers unbonded flexible pipe assemblies with end fittings for production, export and injection applications as flowlines, risers and jumpers; API 17K covers bonded flexible pipe assemblies used as flowlines, risers, jumpers and offshore loading and discharge hoses; and DNV-ST-F119 provides design, load-analysis and reliability requirements for thermoplastic composite pipes in offshore applications. Together, these standards reflect a multi-material, multi-structure and multi-standard development pattern for flexible pipeline systems.

In terms of industry trends, flexible pipeline systems are moving toward higher pressure capability, corrosion resistance, lightweighting, longer service life, reel-lay installation, modular connection, online monitoring and lifecycle integrity management. Traditional flexible pipes focused mainly on pressure resistance, bending flexibility, abrasion resistance and installation convenience, while current system-level applications place greater emphasis on long-term material stability, end-fitting reliability, fatigue life, rapid gas decompression resistance, media compatibility, outer-sheath integrity and adaptability to complex environments. In marine engineering, flexible pipe systems must accommodate waves, currents, floating-facility motion and complex subsea routing; in onshore oil and gas and industrial applications, they place greater emphasis on corrosion resistance, reduced welding, fast deployment, maintenance convenience and complex terrain adaptability. With the development of composite materials, thermoplastic liners, fibre-optic sensing, pressure and temperature monitoring, and digital integrity assessment, flexible pipeline systems are evolving from simple fluid-transfer components into monitorable, assessable and maintainable engineering assets.

The main growth drivers come from three areas. First, oil and gas production, subsea tiebacks, onshore gathering, injection systems, industrial fluids and utility applications continue to require more flexible, corrosion-resistant and easier-to-install pipeline solutions to reduce construction complexity and lifecycle cost. Second, conventional metallic pipelines face limitations in corrosion, welding requirements, installation lead time, complex routing and maintenance cost, encouraging project owners to adopt composite-reinforced, nonmetallic-lined, reelable and modular flexible pipeline solutions. Third, aging-pipeline replacement, marginal-field development, offshore asset life extension, low-carbon energy applications and higher industrial safety requirements are

pushing flexible pipeline systems beyond simple rigid-pipe substitution toward high-reliability, low-maintenance, fast-deployment and sustainable engineering solutions.

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

This report is a detailed and comprehensive analysis of the world market for Flexible Pipeline System 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 Flexible Pipeline System that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Flexible Pipeline System 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 TechnipFMC, NOV Inc., Baker Hughes, Strohm, SoluForce, HAT-FLEX Group, Jieyang Hengtong Marine Technology, Hizenflex, Continental Group, Flexomarine, 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 Flexible Pipeline System 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 Flexible Pipeline System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Flexible Pipeline System Market, Segmentation by Type:

Unbonded Flexible Pipeline

Bonded Flexible Pipeline

Global Flexible Pipeline System Market, Segmentation by End-use Scenario:

Subsea Flexible Flowlines

Flexible Risers

Onshore Flexible Pipeline

Others

Global Flexible Pipeline System Market, Segmentation by Transported Medium:

Crude Oil and Multiphase Fluids

Natural Gas

Water Injection

Others

Global Flexible Pipeline System Market, Segmentation by Application:

Oil and Gas

Marine Renewable Energy

Other

Companies Profiled:

TechnipFMC

NOV Inc.

Baker Hughes

Strohman

SoluForce

HAT-FLEX Group

Jieyang Hengtong Marine Technology

Hizenflex

Continental Group

Flexomarine

Trelleborg

Yokohama

FlexSteel Pipe

OPR Offshore Engineering Equipment

Yuelong Technology

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

- 1.1 Flexible Pipeline System Introduction
- 1.2 World Flexible Pipeline System Supply & Forecast
 - 1.2.1 World Flexible Pipeline System Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Flexible Pipeline System Production (2021-2032)
 - 1.2.3 World Flexible Pipeline System Pricing Trends (2021-2032)
- 1.3 World Flexible Pipeline System Production by Region (Based on Production Site)
 - 1.3.1 World Flexible Pipeline System Production Value by Region (2021-2032)
 - 1.3.2 World Flexible Pipeline System Production by Region (2021-2032)
 - 1.3.3 World Flexible Pipeline System Average Price by Region (2021-2032)
 - 1.3.4 North America Flexible Pipeline System Production (2021-2032)
 - 1.3.5 Europe Flexible Pipeline System Production (2021-2032)
 - 1.3.6 China Flexible Pipeline System Production (2021-2032)
 - 1.3.7 Japan Flexible Pipeline System Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Flexible Pipeline System Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Flexible Pipeline System Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Flexible Pipeline System Demand (2021-2032)
- 2.2 World Flexible Pipeline System Consumption by Region
 - 2.2.1 World Flexible Pipeline System Consumption by Region (2021-2026)
 - 2.2.2 World Flexible Pipeline System Consumption Forecast by Region (2027-2032)
- 2.3 United States Flexible Pipeline System Consumption (2021-2032)
- 2.4 China Flexible Pipeline System Consumption (2021-2032)
- 2.5 Europe Flexible Pipeline System Consumption (2021-2032)
- 2.6 Japan Flexible Pipeline System Consumption (2021-2032)
- 2.7 South Korea Flexible Pipeline System Consumption (2021-2032)
- 2.8 ASEAN Flexible Pipeline System Consumption (2021-2032)
- 2.9 India Flexible Pipeline System Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Flexible Pipeline System Production Value by Manufacturer (2021-2026)

- 3.2 World Flexible Pipeline System Production by Manufacturer (2021-2026)
- 3.3 World Flexible Pipeline System Average Price by Manufacturer (2021-2026)
- 3.4 Flexible Pipeline System Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Flexible Pipeline System Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Flexible Pipeline System in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Flexible Pipeline System in 2025
- 3.6 Flexible Pipeline System Market: Overall Company Footprint Analysis
 - 3.6.1 Flexible Pipeline System Market: Region Footprint
 - 3.6.2 Flexible Pipeline System Market: Company Product Type Footprint
 - 3.6.3 Flexible Pipeline System Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Flexible Pipeline System Production Value Comparison
 - 4.1.1 United States VS China: Flexible Pipeline System Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Flexible Pipeline System Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Flexible Pipeline System Production Comparison
 - 4.2.1 United States VS China: Flexible Pipeline System Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Flexible Pipeline System Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Flexible Pipeline System Consumption Comparison
 - 4.3.1 United States VS China: Flexible Pipeline System Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Flexible Pipeline System Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Flexible Pipeline System Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Flexible Pipeline System Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Flexible Pipeline System Production Value (2021-2026)

4.4.3 United States Based Manufacturers Flexible Pipeline System Production (2021-2026)

4.5 China Based Flexible Pipeline System Manufacturers and Market Share

4.5.1 China Based Flexible Pipeline System Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Flexible Pipeline System Production Value (2021-2026)

4.5.3 China Based Manufacturers Flexible Pipeline System Production (2021-2026)

4.6 Rest of World Based Flexible Pipeline System Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Flexible Pipeline System Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Flexible Pipeline System Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Flexible Pipeline System Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Flexible Pipeline System Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Unbonded Flexible Pipeline

5.2.2 Bonded Flexible Pipeline

5.3 Market Segment by Type

5.3.1 World Flexible Pipeline System Production by Type (2021-2032)

5.3.2 World Flexible Pipeline System Production Value by Type (2021-2032)

5.3.3 World Flexible Pipeline System Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY END-USE SCENARIO

6.1 World Flexible Pipeline System Market Size Overview by End-use Scenario: 2021 VS 2025 VS 2032

6.2 Segment Introduction by End-use Scenario

6.2.1 Subsea Flexible Flowlines

6.2.2 Flexible Risers

6.2.3 Onshore Flexible Pipeline

6.2.4 Others

6.3 Market Segment by End-use Scenario

6.3.1 World Flexible Pipeline System Production by End-use Scenario (2021-2032)

6.3.2 World Flexible Pipeline System Production Value by End-use Scenario (2021-2032)

6.3.3 World Flexible Pipeline System Average Price by End-use Scenario (2021-2032)

7 MARKET ANALYSIS BY TRANSPORTED MEDIUM

7.1 World Flexible Pipeline System Market Size Overview by Transported Medium: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Transported Medium

7.2.1 Crude Oil and Multiphase Fluids

7.2.2 Natural Gas

7.2.3 Water Injection

7.2.4 Others

7.3 Market Segment by Transported Medium

7.3.1 World Flexible Pipeline System Production by Transported Medium (2021-2032)

7.3.2 World Flexible Pipeline System Production Value by Transported Medium (2021-2032)

7.3.3 World Flexible Pipeline System Average Price by Transported Medium (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Flexible Pipeline System Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Oil and Gas

8.2.2 Marine Renewable Energy

8.2.3 Other

8.3 Market Segment by Application

8.3.1 World Flexible Pipeline System Production by Application (2021-2032)

8.3.2 World Flexible Pipeline System Production Value by Application (2021-2032)

8.3.3 World Flexible Pipeline System Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 TechnipFMC

- 9.1.1 TechnipFMC Details
- 9.1.2 TechnipFMC Major Business
- 9.1.3 TechnipFMC Flexible Pipeline System Product and Services
- 9.1.4 TechnipFMC Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 TechnipFMC Recent Developments/Updates
- 9.1.6 TechnipFMC Competitive Strengths & Weaknesses
- 9.2 NOV Inc.
 - 9.2.1 NOV Inc. Details
 - 9.2.2 NOV Inc. Major Business
 - 9.2.3 NOV Inc. Flexible Pipeline System Product and Services
 - 9.2.4 NOV Inc. Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.2.5 NOV Inc. Recent Developments/Updates
 - 9.2.6 NOV Inc. Competitive Strengths & Weaknesses
- 9.3 Baker Hughes
 - 9.3.1 Baker Hughes Details
 - 9.3.2 Baker Hughes Major Business
 - 9.3.3 Baker Hughes Flexible Pipeline System Product and Services
 - 9.3.4 Baker Hughes Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Baker Hughes Recent Developments/Updates
 - 9.3.6 Baker Hughes Competitive Strengths & Weaknesses
- 9.4 Strohm
 - 9.4.1 Strohm Details
 - 9.4.2 Strohm Major Business
 - 9.4.3 Strohm Flexible Pipeline System Product and Services
 - 9.4.4 Strohm Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Strohm Recent Developments/Updates
 - 9.4.6 Strohm Competitive Strengths & Weaknesses
- 9.5 SoluForce
 - 9.5.1 SoluForce Details
 - 9.5.2 SoluForce Major Business
 - 9.5.3 SoluForce Flexible Pipeline System Product and Services
 - 9.5.4 SoluForce Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 SoluForce Recent Developments/Updates
 - 9.5.6 SoluForce Competitive Strengths & Weaknesses

9.6 HAT-FLEX Group

9.6.1 HAT-FLEX Group Details

9.6.2 HAT-FLEX Group Major Business

9.6.3 HAT-FLEX Group Flexible Pipeline System Product and Services

9.6.4 HAT-FLEX Group Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 HAT-FLEX Group Recent Developments/Updates

9.6.6 HAT-FLEX Group Competitive Strengths & Weaknesses

9.7 Jieyang Hengtong Marine Technology

9.7.1 Jieyang Hengtong Marine Technology Details

9.7.2 Jieyang Hengtong Marine Technology Major Business

9.7.3 Jieyang Hengtong Marine Technology Flexible Pipeline System Product and Services

9.7.4 Jieyang Hengtong Marine Technology Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Jieyang Hengtong Marine Technology Recent Developments/Updates

9.7.6 Jieyang Hengtong Marine Technology Competitive Strengths & Weaknesses

9.8 Hizenflex

9.8.1 Hizenflex Details

9.8.2 Hizenflex Major Business

9.8.3 Hizenflex Flexible Pipeline System Product and Services

9.8.4 Hizenflex Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Hizenflex Recent Developments/Updates

9.8.6 Hizenflex Competitive Strengths & Weaknesses

9.9 Continental Group

9.9.1 Continental Group Details

9.9.2 Continental Group Major Business

9.9.3 Continental Group Flexible Pipeline System Product and Services

9.9.4 Continental Group Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Continental Group Recent Developments/Updates

9.9.6 Continental Group Competitive Strengths & Weaknesses

9.10 Flexomarine

9.10.1 Flexomarine Details

9.10.2 Flexomarine Major Business

9.10.3 Flexomarine Flexible Pipeline System Product and Services

9.10.4 Flexomarine Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.10.5 Flexomarine Recent Developments/Updates
- 9.10.6 Flexomarine Competitive Strengths & Weaknesses
- 9.11 Trelleborg
 - 9.11.1 Trelleborg Details
 - 9.11.2 Trelleborg Major Business
 - 9.11.3 Trelleborg Flexible Pipeline System Product and Services
 - 9.11.4 Trelleborg Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Trelleborg Recent Developments/Updates
 - 9.11.6 Trelleborg Competitive Strengths & Weaknesses
- 9.12 Yokohama
 - 9.12.1 Yokohama Details
 - 9.12.2 Yokohama Major Business
 - 9.12.3 Yokohama Flexible Pipeline System Product and Services
 - 9.12.4 Yokohama Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Yokohama Recent Developments/Updates
 - 9.12.6 Yokohama Competitive Strengths & Weaknesses
- 9.13 FlexSteel Pipe
 - 9.13.1 FlexSteel Pipe Details
 - 9.13.2 FlexSteel Pipe Major Business
 - 9.13.3 FlexSteel Pipe Flexible Pipeline System Product and Services
 - 9.13.4 FlexSteel Pipe Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 FlexSteel Pipe Recent Developments/Updates
 - 9.13.6 FlexSteel Pipe Competitive Strengths & Weaknesses
- 9.14 OPR Offshore Engineering Equipment
 - 9.14.1 OPR Offshore Engineering Equipment Details
 - 9.14.2 OPR Offshore Engineering Equipment Major Business
 - 9.14.3 OPR Offshore Engineering Equipment Flexible Pipeline System Product and Services
 - 9.14.4 OPR Offshore Engineering Equipment Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 OPR Offshore Engineering Equipment Recent Developments/Updates
 - 9.14.6 OPR Offshore Engineering Equipment Competitive Strengths & Weaknesses
- 9.15 Yuelong Technology
 - 9.15.1 Yuelong Technology Details
 - 9.15.2 Yuelong Technology Major Business
 - 9.15.3 Yuelong Technology Flexible Pipeline System Product and Services

9.15.4 Yuelong Technology Flexible Pipeline System Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Yuelong Technology Recent Developments/Updates

9.15.6 Yuelong Technology Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Flexible Pipeline System Industry Chain

10.2 Flexible Pipeline System Upstream Analysis

10.2.1 Flexible Pipeline System Core Raw Materials

10.2.2 Main Manufacturers of Flexible Pipeline System Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Flexible Pipeline System Production Mode

10.6 Flexible Pipeline System Procurement Model

10.7 Flexible Pipeline System Industry Sales Model and Sales Channels

10.7.1 Flexible Pipeline System Sales Model

10.7.2 Flexible Pipeline System Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Flexible Pipeline System Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Flexible Pipeline System Production Value by Region (2021-2026) & (USD Million)

Table 3. World Flexible Pipeline System Production Value by Region (2027-2032) & (USD Million)

Table 4. World Flexible Pipeline System Production Value Market Share by Region (2021-2026)

Table 5. World Flexible Pipeline System Production Value Market Share by Region (2027-2032)

Table 6. World Flexible Pipeline System Production by Region (2021-2026) & (K Meter)

Table 7. World Flexible Pipeline System Production by Region (2027-2032) & (K Meter)

Table 8. World Flexible Pipeline System Production Market Share by Region (2021-2026)

Table 9. World Flexible Pipeline System Production Market Share by Region (2027-2032)

Table 10. World Flexible Pipeline System Average Price by Region (2021-2026) & (US\$/Meter)

Table 11. World Flexible Pipeline System Average Price by Region (2027-2032) & (US\$/Meter)

Table 12. Flexible Pipeline System Major Market Trends

Table 13. World Flexible Pipeline System Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Meter)

Table 14. World Flexible Pipeline System Consumption by Region (2021-2026) & (K Meter)

Table 15. World Flexible Pipeline System Consumption Forecast by Region (2027-2032) & (K Meter)

Table 16. World Flexible Pipeline System Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Flexible Pipeline System Producers in 2025

Table 18. World Flexible Pipeline System Production by Manufacturer (2021-2026) & (K Meter)

Table 19. Production Market Share of Key Flexible Pipeline System Producers in 2025

Table 20. World Flexible Pipeline System Average Price by Manufacturer (2021-2026) &

(US\$/Meter)

Table 21. Global Flexible Pipeline System Company Evaluation Quadrant

Table 22. World Flexible Pipeline System Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Flexible Pipeline System Production Site of Key Manufacturer

Table 24. Flexible Pipeline System Market: Company Product Type Footprint

Table 25. Flexible Pipeline System Market: Company Product Application Footprint

Table 26. Flexible Pipeline System Competitive Factors

Table 27. Flexible Pipeline System New Entrant and Capacity Expansion Plans

Table 28. Flexible Pipeline System Mergers & Acquisitions Activity

Table 29. United States VS China Flexible Pipeline System Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Flexible Pipeline System Production Comparison, (2021 & 2025 & 2032) & (K Meter)

Table 31. United States VS China Flexible Pipeline System Consumption Comparison, (2021 & 2025 & 2032) & (K Meter)

Table 32. United States Based Flexible Pipeline System Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Flexible Pipeline System Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Flexible Pipeline System Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Flexible Pipeline System Production (2021-2026) & (K Meter)

Table 36. United States Based Manufacturers Flexible Pipeline System Production Market Share (2021-2026)

Table 37. China Based Flexible Pipeline System Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Flexible Pipeline System Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Flexible Pipeline System Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Flexible Pipeline System Production, (2021-2026) & (K Meter)

Table 41. China Based Manufacturers Flexible Pipeline System Production Market Share (2021-2026)

Table 42. Rest of World Based Flexible Pipeline System Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Flexible Pipeline System Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Flexible Pipeline System Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Flexible Pipeline System Production, (2021-2026) & (K Meter)

Table 46. Rest of World Based Manufacturers Flexible Pipeline System Production Market Share (2021-2026)

Table 47. World Flexible Pipeline System Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Flexible Pipeline System Production by Type (2021-2026) & (K Meter)

Table 49. World Flexible Pipeline System Production by Type (2027-2032) & (K Meter)

Table 50. World Flexible Pipeline System Production Value by Type (2021-2026) & (USD Million)

Table 51. World Flexible Pipeline System Production Value by Type (2027-2032) & (USD Million)

Table 52. World Flexible Pipeline System Average Price by Type (2021-2026) & (US\$/Meter)

Table 53. World Flexible Pipeline System Average Price by Type (2027-2032) & (US\$/Meter)

Table 54. World Flexible Pipeline System Production Value by End-use Scenario, (USD Million), 2021 & 2025 & 2032

Table 55. World Flexible Pipeline System Production by End-use Scenario (2021-2026) & (K Meter)

Table 56. World Flexible Pipeline System Production by End-use Scenario (2027-2032) & (K Meter)

Table 57. World Flexible Pipeline System Production Value by End-use Scenario (2021-2026) & (USD Million)

Table 58. World Flexible Pipeline System Production Value by End-use Scenario (2027-2032) & (USD Million)

Table 59. World Flexible Pipeline System Average Price by End-use Scenario (2021-2026) & (US\$/Meter)

Table 60. World Flexible Pipeline System Average Price by End-use Scenario (2027-2032) & (US\$/Meter)

Table 61. World Flexible Pipeline System Production Value by Transported Medium, (USD Million), 2021 & 2025 & 2032

Table 62. World Flexible Pipeline System Production by Transported Medium (2021-2026) & (K Meter)

Table 63. World Flexible Pipeline System Production by Transported Medium

(2027-2032) & (K Meter)

Table 64. World Flexible Pipeline System Production Value by Transported Medium (2021-2026) & (USD Million)

Table 65. World Flexible Pipeline System Production Value by Transported Medium (2027-2032) & (USD Million)

Table 66. World Flexible Pipeline System Average Price by Transported Medium (2021-2026) & (US\$/Meter)

Table 67. World Flexible Pipeline System Average Price by Transported Medium (2027-2032) & (US\$/Meter)

Table 68. World Flexible Pipeline System Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Flexible Pipeline System Production by Application (2021-2026) & (K Meter)

Table 70. World Flexible Pipeline System Production by Application (2027-2032) & (K Meter)

Table 71. World Flexible Pipeline System Production Value by Application (2021-2026) & (USD Million)

Table 72. World Flexible Pipeline System Production Value by Application (2027-2032) & (USD Million)

Table 73. World Flexible Pipeline System Average Price by Application (2021-2026) & (US\$/Meter)

Table 74. World Flexible Pipeline System Average Price by Application (2027-2032) & (US\$/Meter)

Table 75. TechnipFMC Basic Information, Manufacturing Base and Competitors

Table 76. TechnipFMC Major Business

Table 77. TechnipFMC Flexible Pipeline System Product and Services

Table 78. TechnipFMC Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. TechnipFMC Recent Developments/Updates

Table 80. TechnipFMC Competitive Strengths & Weaknesses

Table 81. NOV Inc. Basic Information, Manufacturing Base and Competitors

Table 82. NOV Inc. Major Business

Table 83. NOV Inc. Flexible Pipeline System Product and Services

Table 84. NOV Inc. Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. NOV Inc. Recent Developments/Updates

Table 86. NOV Inc. Competitive Strengths & Weaknesses

Table 87. Baker Hughes Basic Information, Manufacturing Base and Competitors

Table 88. Baker Hughes Major Business

Table 89. Baker Hughes Flexible Pipeline System Product and Services

Table 90. Baker Hughes Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Baker Hughes Recent Developments/Updates

Table 92. Baker Hughes Competitive Strengths & Weaknesses

Table 93. Strohm Basic Information, Manufacturing Base and Competitors

Table 94. Strohm Major Business

Table 95. Strohm Flexible Pipeline System Product and Services

Table 96. Strohm Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Strohm Recent Developments/Updates

Table 98. Strohm Competitive Strengths & Weaknesses

Table 99. SoluForce Basic Information, Manufacturing Base and Competitors

Table 100. SoluForce Major Business

Table 101. SoluForce Flexible Pipeline System Product and Services

Table 102. SoluForce Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. SoluForce Recent Developments/Updates

Table 104. SoluForce Competitive Strengths & Weaknesses

Table 105. HAT-FLEX Group Basic Information, Manufacturing Base and Competitors

Table 106. HAT-FLEX Group Major Business

Table 107. HAT-FLEX Group Flexible Pipeline System Product and Services

Table 108. HAT-FLEX Group Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. HAT-FLEX Group Recent Developments/Updates

Table 110. HAT-FLEX Group Competitive Strengths & Weaknesses

Table 111. Jieyang Hengtong Marine Technology Basic Information, Manufacturing Base and Competitors

Table 112. Jieyang Hengtong Marine Technology Major Business

Table 113. Jieyang Hengtong Marine Technology Flexible Pipeline System Product and Services

Table 114. Jieyang Hengtong Marine Technology Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Jieyang Hengtong Marine Technology Recent Developments/Updates

Table 116. Jieyang Hengtong Marine Technology Competitive Strengths & Weaknesses

Table 117. Hizenflex Basic Information, Manufacturing Base and Competitors

Table 118. Hizenflex Major Business

Table 119. Hizenflex Flexible Pipeline System Product and Services

Table 120. Hizenflex Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Hizenflex Recent Developments/Updates

Table 122. Hizenflex Competitive Strengths & Weaknesses

Table 123. Continental Group Basic Information, Manufacturing Base and Competitors

Table 124. Continental Group Major Business

Table 125. Continental Group Flexible Pipeline System Product and Services

Table 126. Continental Group Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Continental Group Recent Developments/Updates

Table 128. Continental Group Competitive Strengths & Weaknesses

Table 129. Flexomarine Basic Information, Manufacturing Base and Competitors

Table 130. Flexomarine Major Business

Table 131. Flexomarine Flexible Pipeline System Product and Services

Table 132. Flexomarine Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Flexomarine Recent Developments/Updates

Table 134. Flexomarine Competitive Strengths & Weaknesses

Table 135. Trelleborg Basic Information, Manufacturing Base and Competitors

Table 136. Trelleborg Major Business

Table 137. Trelleborg Flexible Pipeline System Product and Services

Table 138. Trelleborg Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Trelleborg Recent Developments/Updates

Table 140. Trelleborg Competitive Strengths & Weaknesses

Table 141. Yokohama Basic Information, Manufacturing Base and Competitors

Table 142. Yokohama Major Business

Table 143. Yokohama Flexible Pipeline System Product and Services

Table 144. Yokohama Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Yokohama Recent Developments/Updates

Table 146. Yokohama Competitive Strengths & Weaknesses
Table 147. FlexSteel Pipe Basic Information, Manufacturing Base and Competitors
Table 148. FlexSteel Pipe Major Business
Table 149. FlexSteel Pipe Flexible Pipeline System Product and Services
Table 150. FlexSteel Pipe Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. FlexSteel Pipe Recent Developments/Updates
Table 152. FlexSteel Pipe Competitive Strengths & Weaknesses
Table 153. OPR Offshore Engineering Equipment Basic Information, Manufacturing Base and Competitors
Table 154. OPR Offshore Engineering Equipment Major Business
Table 155. OPR Offshore Engineering Equipment Flexible Pipeline System Product and Services
Table 156. OPR Offshore Engineering Equipment Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. OPR Offshore Engineering Equipment Recent Developments/Updates
Table 158. OPR Offshore Engineering Equipment Competitive Strengths & Weaknesses
Table 159. Yuelong Technology Basic Information, Manufacturing Base and Competitors
Table 160. Yuelong Technology Major Business
Table 161. Yuelong Technology Flexible Pipeline System Product and Services
Table 162. Yuelong Technology Flexible Pipeline System Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Yuelong Technology Recent Developments/Updates
Table 164. Yuelong Technology Competitive Strengths & Weaknesses
Table 165. Global Key Players of Flexible Pipeline System Upstream (Raw Materials)
Table 166. Global Flexible Pipeline System Typical Customers
Table 167. Flexible Pipeline System Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Flexible Pipeline System Picture

Figure 2. World Flexible Pipeline System Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Flexible Pipeline System Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Flexible Pipeline System Production (2021-2032) & (K Meter)

Figure 5. World Flexible Pipeline System Average Price (2021-2032) & (US\$/Meter)

Figure 6. World Flexible Pipeline System Production Value Market Share by Region (2021-2032)

Figure 7. World Flexible Pipeline System Production Market Share by Region (2021-2032)

Figure 8. North America Flexible Pipeline System Production (2021-2032) & (K Meter)

Figure 9. Europe Flexible Pipeline System Production (2021-2032) & (K Meter)

Figure 10. China Flexible Pipeline System Production (2021-2032) & (K Meter)

Figure 11. Japan Flexible Pipeline System Production (2021-2032) & (K Meter)

Figure 12. Flexible Pipeline System Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Flexible Pipeline System Consumption (2021-2032) & (K Meter)

Figure 15. World Flexible Pipeline System Consumption Market Share by Region (2021-2032)

Figure 16. United States Flexible Pipeline System Consumption (2021-2032) & (K Meter)

Figure 17. China Flexible Pipeline System Consumption (2021-2032) & (K Meter)

Figure 18. Europe Flexible Pipeline System Consumption (2021-2032) & (K Meter)

Figure 19. Japan Flexible Pipeline System Consumption (2021-2032) & (K Meter)

Figure 20. South Korea Flexible Pipeline System Consumption (2021-2032) & (K Meter)

Figure 21. ASEAN Flexible Pipeline System Consumption (2021-2032) & (K Meter)

Figure 22. India Flexible Pipeline System Consumption (2021-2032) & (K Meter)

Figure 23. Producer Shipments of Flexible Pipeline System by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Flexible Pipeline System Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Flexible Pipeline System Markets in 2025

Figure 26. United States VS China: Flexible Pipeline System Production Value Market

Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Flexible Pipeline System Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Flexible Pipeline System Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Flexible Pipeline System Production Market Share 2025

Figure 30. China Based Manufacturers Flexible Pipeline System Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Flexible Pipeline System Production Market Share 2025

Figure 32. World Flexible Pipeline System Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Flexible Pipeline System Production Value Market Share by Type in 2025

Figure 34. Unbonded Flexible Pipeline

Figure 35. Bonded Flexible Pipeline

Figure 36. World Flexible Pipeline System Production Market Share by Type (2021-2032)

Figure 37. World Flexible Pipeline System Production Value Market Share by Type (2021-2032)

Figure 38. World Flexible Pipeline System Average Price by Type (2021-2032) & (US\$/Meter)

Figure 39. World Flexible Pipeline System Production Value by End-use Scenario, (USD Million), 2021 & 2025 & 2032

Figure 40. World Flexible Pipeline System Production Value Market Share by End-use Scenario in 2025

Figure 41. Subsea Flexible Flowlines

Figure 42. Flexible Risers

Figure 43. Onshore Flexible Pipeline

Figure 44. Others

Figure 45. World Flexible Pipeline System Production Market Share by End-use Scenario (2021-2032)

Figure 46. World Flexible Pipeline System Production Value Market Share by End-use Scenario (2021-2032)

Figure 47. World Flexible Pipeline System Average Price by End-use Scenario (2021-2032) & (US\$/Meter)

Figure 48. World Flexible Pipeline System Production Value by Transported Medium, (USD Million), 2021 & 2025 & 2032

- Figure 49. World Flexible Pipeline System Production Value Market Share by Transported Medium in 2025
- Figure 50. Crude Oil and Multiphase Fluids
- Figure 51. Natural Gas
- Figure 52. Water Injection
- Figure 53. Others
- Figure 54. World Flexible Pipeline System Production Market Share by Transported Medium (2021-2032)
- Figure 55. World Flexible Pipeline System Production Value Market Share by Transported Medium (2021-2032)
- Figure 56. World Flexible Pipeline System Average Price by Transported Medium (2021-2032) & (US\$/Meter)
- Figure 57. World Flexible Pipeline System Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 58. World Flexible Pipeline System Production Value Market Share by Application in 2025
- Figure 59. Oil and Gas
- Figure 60. Marine Renewable Energy
- Figure 61. Other
- Figure 62. World Flexible Pipeline System Production Market Share by Application (2021-2032)
- Figure 63. World Flexible Pipeline System Production Value Market Share by Application (2021-2032)
- Figure 64. World Flexible Pipeline System Average Price by Application (2021-2032) & (US\$/Meter)
- Figure 65. Flexible Pipeline System Industry Chain
- Figure 66. Flexible Pipeline System Procurement Model
- Figure 67. Flexible Pipeline System Sales Model
- Figure 68. Flexible Pipeline System Sales Channels, Direct Sales, and Distribution
- Figure 69. Methodology
- Figure 70. Research Process and Data Source

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