

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

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Abstracts

The global Non-Bonded Marine Flexible Pipeline market size is expected to reach \$ 1993 million by 2032, rising at a market growth of 6.7% CAGR during the forecast period (2026-2032).

Non-bonded marine flexible pipeline refers to a multilayer flexible pipe system used in offshore oil and gas production, subsea transportation, deepwater risers and subsea equipment connections. A typical pipe consists of an internal pressure sheath, pressure armor, tensile armor, anti-wear layers, outer sheath and end fittings. Its functional layers are not fully bonded together, but work as a layered structure to withstand internal pressure, external pressure, tension, bending, fatigue and corrosive service. Key applications include subsea flowlines, dynamic risers, jumpers, injection lines and production/export lines.

The upstream supply chain includes high-performance polymers, polyamide or fluoropolymer liners, carbon steel or stainless steel armor wires, anti-wear tapes, outer sheath materials, end fittings, seals, flanges, connectors, buoyancy modules and testing equipment. The midstream process covers structural design, material selection, liner extrusion, armor winding, outer sheath extrusion, end-fitting assembly, hydrostatic testing, fatigue testing, bending tests, corrosion qualification and project certification. Downstream customers are mainly offshore oil and gas operators, FPSO and floating production projects, subsea production system integrators and offshore EPCI contractors.

In 2025, global non-bonded marine flexible pipeline production reached approximately 1,500 km, with an average global market price is \$800 per meter.

From a global industry perspective, non-bonded marine flexible pipeline is one of the most mature and widely used flexible pipeline forms in offshore oil and gas development. API 17J applies to unbonded flexible pipe assemblies with end fittings, covering both static and dynamic flexible pipes used as flowlines, risers and jumpers for production, export and injection applications involving oil, gas, water and injection chemicals; it does not cover bonded flexible pipes or flexible pipes with nonmetallic tensile and pressure armour wires and structural composite layers. Compared with bonded flexible hoses, the defining feature of non-bonded structures is that the functional layers can move relative to one another, with each layer separately performing sealing, internal-pressure resistance, tensile-load resistance, anti-wear and external-protection functions. This makes them particularly suitable for deepwater dynamic risers, subsea jumpers, floating production facility tie-ins and long-term service under complex marine conditions. ISO 13628-2 similarly defines the scope around unbonded flexible pipe systems for subsea and marine applications, covering static and dynamic flowlines, risers and jumpers for sweet and sour production, export and injection service.

In terms of industry trends, non-bonded marine flexible pipelines are moving toward deeper-water capability, higher pressure ratings, sour-service resistance, longer life, lighter structures, integrity monitoring and complex-condition adaptability. Conventional unbonded flexible pipes rely mainly on steel pressure armour and tensile armour to withstand hoop stress and axial loads. In a typical structure, the carcass and pressure armour resist radial loads, the internal pressure sheath provides sealing, the tensile armour provides axial stiffness, and the outer sheath protects against external damage. As deepwater, ultra-deepwater and high-pressure/high-temperature fields develop, the industry is placing greater emphasis on fatigue life, outer-sheath integrity, annulus management, H₂S/CO₂ sour-service compatibility, rapid gas decompression, end-fitting reliability and bend control during installation. At the same time, carbon-fibre or composite reinforcement, corrosion monitoring, fibre-optic sensing, digital integrity management and risk-based inspection and maintenance are becoming important technical directions, although new structures and materials still require rigorous qualification and long-term field track records.

The main growth drivers come from three areas. First, deepwater oil and gas, floating production systems, subsea tiebacks and marginal-field developments require flexible, dynamically capable pipeline systems that can be installed under complex marine conditions, supporting continued use of non-bonded flexible pipes in risers, jumpers and subsea flowlines. Second, corrosion, fatigue, installation windows, vessel availability and maintenance costs in offshore environments are pushing project owners to place

greater emphasis on installability, fatigue performance, integrity monitoring and lifecycle reliability. Third, life extension, replacement and maintenance of aging offshore assets are expanding the role of non-bonded flexible pipelines beyond new projects into brownfield upgrades, reliability improvement and risk-control applications.

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Non-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 TechnipFMC, NOV Inc., Baker Hughes, HAT-FLEX Group, Jieyang Hengtong Marine Technology, Hizenflex, OPR

Offshore Engineering Equipment, 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 Non-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 Non-Bonded Marine Flexible Pipeline Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-Bonded Marine Flexible Pipeline Market, Segmentation by Type:

Flexible Flowlines

Flexible Risers

Others

Global Non-Bonded Marine Flexible Pipeline Market, Segmentation by Water Depth:

Shallow Water

Deepwater

Ultra-deepwater

Floating Unit Connection

Others

Global Non-Bonded Marine Flexible Pipeline Market, Segmentation by Transported Medium:

Crude Oil and Multiphase Fluids

Natural Gas

Water Injection

Others

Global Non-Bonded Marine Flexible Pipeline Market, Segmentation by Application:

Offshore Oil Production

Offshore Gas Production

Deepwater and Ultra-deepwater Development

Floating Production Connections

Others

Companies Profiled:

TechnipFMC

NOV Inc.

Baker Hughes

HAT-FLEX Group

Jieyang Hengtong Marine Technology

Hizenflex

OPR Offshore Engineering Equipment

Key Questions Answered:

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

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