

Global Subsea Manifold Modules Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Subsea Manifold Modules market size is expected to reach \$ 9219 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

Subsea manifold modules are modular seabed-installed fluid gathering, distribution, isolation, regulation and monitoring units used in subsea oil and gas production systems. They typically consist of piping, valves, chokes, connectors, jumper interfaces, metering devices, control interfaces and support structures. These modules are used to gather production fluids from multiple subsea wells or distribute water, gas and chemicals to injection wells, supporting deepwater field development, subsea tiebacks, reservoir pressure maintenance, gas lift and brownfield recovery. A subsea manifold is essentially an arrangement of piping and valves designed to combine, distribute, control and monitor subsea fluid flow.

The upstream supply chain includes alloy steel, duplex and super-duplex stainless steel, nickel alloys, CRA cladding, forgings, castings, API 6A/17D valves, subsea chokes, connectors, seals, flow meters, sensors, corrosion protection, cathodic protection and subsea control modules. Downstream customers are mainly offshore operators, national oil companies, international oil companies and EPCI contractors.

In 2025, global subsea manifold modules production reached approximately 500 units, with an average global market price is between \$10-15 million per unit.

From a global industry perspective, subsea manifold modules have evolved from highly customized large manifold structures into standardized, configurable and modular subsea system units. Their core value lies in integrating production, injection, isolation, switching, metering, monitoring and ROV intervention functions into a subsea module

that can be installed, tested, transported and maintained more efficiently, thereby reducing subsea system complexity, minimizing engineering interfaces and shortening project delivery cycles. API RP 17P includes production and injection manifolds, as well as modular and integrated single-satellite and multi-well templates, within the recommended-practice scope for subsea structures and manifolds, showing that subsea manifold modules are an important object of standardized subsea system design. SLB also describes subsea production systems as including subsea wells, trees, production controls, manifolds, jumpers, flowlines, risers, umbilicals and processing components, with water or gas injection back into subsea wells also forming part of subsea production system functionality.

In terms of industry trends, subsea manifold modules are moving toward standardized configuration, modular combination, deeper-water capability, higher pressure ratings, lightweighting, remote control, intelligent monitoring and lifecycle integrity management. Traditional projects often relied on field-specific customization, resulting in longer design cycles, complex interfaces and higher manufacturing and testing costs. New-generation subsea manifold modules place greater emphasis on common core components, standard interfaces, modular templates, configurable valve arrangements and prequalified assemblies to improve delivery efficiency and engineering reliability. OneSubsea's standard subsea manifold materials also emphasize standardized processes, common core components and qualified field-proven assemblies that can be tailored to field architecture while improving subsea operating efficiency and reliability. As deepwater, ultra-deepwater and long-distance subsea tieback projects expand, manifold modules must also handle high external pressure, low temperature, corrosive fluids, sand erosion, hydrate risk, ROV operation, control-system redundancy, and monitoring of pressure, temperature, valve position, flow and leakage.

The main growth drivers come from three areas. First, deepwater oil and gas, subsea tiebacks, marginal fields and floating production systems require more efficient subsea gathering, distribution and connection units to reduce subsea pipeline count, optimize well-cluster layouts and lower overall project complexity. Second, project owners increasingly focus on shortening engineering schedules, reducing CAPEX/OPEX and improving system reliability, pushing manifolds from one-off customized structures toward an engineering model based on standardized core components plus modular configuration. Third, subsea production systems are moving toward digitalized, remotely operated and low-maintenance architectures, requiring subsea manifold modules to work closely with subsea control modules, umbilicals, sensors, valve actuators and integrity-management systems.

This report studies the global Subsea Manifold Modules production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Subsea Manifold Modules 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 Subsea Manifold Modules that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Subsea Manifold Modules total production and demand, 2021-2032, (Units)

Global Subsea Manifold Modules total production value, 2021-2032, (USD Million)

Global Subsea Manifold Modules production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Subsea Manifold Modules consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Subsea Manifold Modules domestic production, consumption, key domestic manufacturers and share

Global Subsea Manifold Modules production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Subsea Manifold Modules production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Subsea Manifold Modules production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Subsea Manifold Modules 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, OneSubsea, Baker Hughes, Innovex International, Trendsetter Engineering, Worldwide Oilfield Machine, COOEC, Larsen & Toubro Limited, McDermott International, Deepsea Technologies, Inc, 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 Subsea Manifold Modules market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) 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 Subsea Manifold Modules Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Subsea Manifold Modules Market, Segmentation by Type:

Production Manifolds

Injection Manifolds

Others

Global Subsea Manifold Modules Market, Segmentation by Water Depth:

Shallow-Water Manifold Modules

Deepwater Manifold Modules

Ultra-Deepwater Manifold Modules

Global Subsea Manifold Modules Market, Segmentation by Application:

Deepwater Oil & Gas Production

Subsea Tieback Projects

Multi-well Cluster Development

Brownfield Expansion & Redevelopment

Others

Companies Profiled:

TechnipFMC

OneSubsea

Baker Hughes

Innovex International

Trendsetter Engineering

Worldwide Oilfield Machine

COOEC

Larsen & Toubro Limited

McDermott International

Deepsea Technologies, Inc

NOV Inc.

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Subsea Manifold Modules Production Value by Manufacturer (2021-2026)
- 3.2 World Subsea Manifold Modules Production by Manufacturer (2021-2026)

- 3.3 World Subsea Manifold Modules Average Price by Manufacturer (2021-2026)
- 3.4 Subsea Manifold Modules Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Subsea Manifold Modules Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Subsea Manifold Modules in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Subsea Manifold Modules in 2025
- 3.6 Subsea Manifold Modules Market: Overall Company Footprint Analysis
 - 3.6.1 Subsea Manifold Modules Market: Region Footprint
 - 3.6.2 Subsea Manifold Modules Market: Company Product Type Footprint
 - 3.6.3 Subsea Manifold Modules 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: Subsea Manifold Modules Production Value Comparison
 - 4.1.1 United States VS China: Subsea Manifold Modules Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Subsea Manifold Modules Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Subsea Manifold Modules Production Comparison
 - 4.2.1 United States VS China: Subsea Manifold Modules Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Subsea Manifold Modules Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Subsea Manifold Modules Consumption Comparison
 - 4.3.1 United States VS China: Subsea Manifold Modules Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Subsea Manifold Modules Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Subsea Manifold Modules Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Subsea Manifold Modules Manufacturers, Headquarters and Production Site (States, Country)
 - 4.4.2 United States Based Manufacturers Subsea Manifold Modules Production Value

(2021-2026)

4.4.3 United States Based Manufacturers Subsea Manifold Modules Production

(2021-2026)

4.5 China Based Subsea Manifold Modules Manufacturers and Market Share

4.5.1 China Based Subsea Manifold Modules Manufacturers, Headquarters and
Production Site (Province, Country)

4.5.2 China Based Manufacturers Subsea Manifold Modules Production Value

(2021-2026)

4.5.3 China Based Manufacturers Subsea Manifold Modules Production (2021-2026)

4.6 Rest of World Based Subsea Manifold Modules Manufacturers and Market Share,
2021-2026

4.6.1 Rest of World Based Subsea Manifold Modules Manufacturers, Headquarters and
Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Subsea Manifold Modules Production Value
(2021-2026)

4.6.3 Rest of World Based Manufacturers Subsea Manifold Modules Production
(2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Subsea Manifold Modules Market Size Overview by Type: 2021 VS 2025 VS
2032

5.2 Segment Introduction by Type

5.2.1 Production Manifolds

5.2.2 Injection Manifolds

5.2.3 Others

5.3 Market Segment by Type

5.3.1 World Subsea Manifold Modules Production by Type (2021-2032)

5.3.2 World Subsea Manifold Modules Production Value by Type (2021-2032)

5.3.3 World Subsea Manifold Modules Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY WATER DEPTH

6.1 World Subsea Manifold Modules Market Size Overview by Water Depth: 2021 VS
2025 VS 2032

6.2 Segment Introduction by Water Depth

6.2.1 Shallow-Water Manifold Modules

6.2.2 Deepwater Manifold Modules

6.2.3 Ultra-Deepwater Manifold Modules

6.3 Market Segment by Water Depth

6.3.1 World Subsea Manifold Modules Production by Water Depth (2021-2032)

6.3.2 World Subsea Manifold Modules Production Value by Water Depth (2021-2032)

6.3.3 World Subsea Manifold Modules Average Price by Water Depth (2021-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World Subsea Manifold Modules Market Size Overview by Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application

7.2.1 Deepwater Oil & Gas Production

7.2.2 Subsea Tieback Projects

7.2.3 Multi-well Cluster Development

7.2.4 Brownfield Expansion & Redevelopment

7.2.5 Others

7.3 Market Segment by Application

7.3.1 World Subsea Manifold Modules Production by Application (2021-2032)

7.3.2 World Subsea Manifold Modules Production Value by Application (2021-2032)

7.3.3 World Subsea Manifold Modules Average Price by Application (2021-2032)

8 COMPANY PROFILES

8.1 TechnipFMC

8.1.1 TechnipFMC Details

8.1.2 TechnipFMC Major Business

8.1.3 TechnipFMC Subsea Manifold Modules Product and Services

8.1.4 TechnipFMC Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.1.5 TechnipFMC Recent Developments/Updates

8.1.6 TechnipFMC Competitive Strengths & Weaknesses

8.2 OneSubsea

8.2.1 OneSubsea Details

8.2.2 OneSubsea Major Business

8.2.3 OneSubsea Subsea Manifold Modules Product and Services

8.2.4 OneSubsea Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.2.5 OneSubsea Recent Developments/Updates

8.2.6 OneSubsea Competitive Strengths & Weaknesses

8.3 Baker Hughes

- 8.3.1 Baker Hughes Details
- 8.3.2 Baker Hughes Major Business
- 8.3.3 Baker Hughes Subsea Manifold Modules Product and Services
- 8.3.4 Baker Hughes Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.3.5 Baker Hughes Recent Developments/Updates
- 8.3.6 Baker Hughes Competitive Strengths & Weaknesses
- 8.4 Innovex International
 - 8.4.1 Innovex International Details
 - 8.4.2 Innovex International Major Business
 - 8.4.3 Innovex International Subsea Manifold Modules Product and Services
 - 8.4.4 Innovex International Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.4.5 Innovex International Recent Developments/Updates
 - 8.4.6 Innovex International Competitive Strengths & Weaknesses
- 8.5 Trendsetter Engineering
 - 8.5.1 Trendsetter Engineering Details
 - 8.5.2 Trendsetter Engineering Major Business
 - 8.5.3 Trendsetter Engineering Subsea Manifold Modules Product and Services
 - 8.5.4 Trendsetter Engineering Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.5.5 Trendsetter Engineering Recent Developments/Updates
 - 8.5.6 Trendsetter Engineering Competitive Strengths & Weaknesses
- 8.6 Worldwide Oilfield Machine
 - 8.6.1 Worldwide Oilfield Machine Details
 - 8.6.2 Worldwide Oilfield Machine Major Business
 - 8.6.3 Worldwide Oilfield Machine Subsea Manifold Modules Product and Services
 - 8.6.4 Worldwide Oilfield Machine Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.6.5 Worldwide Oilfield Machine Recent Developments/Updates
 - 8.6.6 Worldwide Oilfield Machine Competitive Strengths & Weaknesses
- 8.7 COOEC
 - 8.7.1 COOEC Details
 - 8.7.2 COOEC Major Business
 - 8.7.3 COOEC Subsea Manifold Modules Product and Services
 - 8.7.4 COOEC Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.7.5 COOEC Recent Developments/Updates
 - 8.7.6 COOEC Competitive Strengths & Weaknesses

8.8 Larsen & Toubro Limited

8.8.1 Larsen & Toubro Limited Details

8.8.2 Larsen & Toubro Limited Major Business

8.8.3 Larsen & Toubro Limited Subsea Manifold Modules Product and Services

8.8.4 Larsen & Toubro Limited Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.8.5 Larsen & Toubro Limited Recent Developments/Updates

8.8.6 Larsen & Toubro Limited Competitive Strengths & Weaknesses

8.9 McDermott International

8.9.1 McDermott International Details

8.9.2 McDermott International Major Business

8.9.3 McDermott International Subsea Manifold Modules Product and Services

8.9.4 McDermott International Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.9.5 McDermott International Recent Developments/Updates

8.9.6 McDermott International Competitive Strengths & Weaknesses

8.10 Deepsea Technologies, Inc

8.10.1 Deepsea Technologies, Inc Details

8.10.2 Deepsea Technologies, Inc Major Business

8.10.3 Deepsea Technologies, Inc Subsea Manifold Modules Product and Services

8.10.4 Deepsea Technologies, Inc Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.10.5 Deepsea Technologies, Inc Recent Developments/Updates

8.10.6 Deepsea Technologies, Inc Competitive Strengths & Weaknesses

8.11 NOV Inc.

8.11.1 NOV Inc. Details

8.11.2 NOV Inc. Major Business

8.11.3 NOV Inc. Subsea Manifold Modules Product and Services

8.11.4 NOV Inc. Subsea Manifold Modules Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.11.5 NOV Inc. Recent Developments/Updates

8.11.6 NOV Inc. Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

9.1 Subsea Manifold Modules Industry Chain

9.2 Subsea Manifold Modules Upstream Analysis

9.2.1 Subsea Manifold Modules Core Raw Materials

9.2.2 Main Manufacturers of Subsea Manifold Modules Core Raw Materials

9.3 Midstream Analysis

9.4 Downstream Analysis

9.5 Subsea Manifold Modules Production Mode

9.6 Subsea Manifold Modules Procurement Model

9.7 Subsea Manifold Modules Industry Sales Model and Sales Channels

9.7.1 Subsea Manifold Modules Sales Model

9.7.2 Subsea Manifold Modules Typical Distributors

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology

11.2 Research Process and Data Source

11.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Subsea Manifold Modules Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Subsea Manifold Modules Production Value by Region (2021-2026) & (USD Million)

Table 3. World Subsea Manifold Modules Production Value by Region (2027-2032) & (USD Million)

Table 4. World Subsea Manifold Modules Production Value Market Share by Region (2021-2026)

Table 5. World Subsea Manifold Modules Production Value Market Share by Region (2027-2032)

Table 6. World Subsea Manifold Modules Production by Region (2021-2026) & (Units)

Table 7. World Subsea Manifold Modules Production by Region (2027-2032) & (Units)

Table 8. World Subsea Manifold Modules Production Market Share by Region (2021-2026)

Table 9. World Subsea Manifold Modules Production Market Share by Region (2027-2032)

Table 10. World Subsea Manifold Modules Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Subsea Manifold Modules Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Subsea Manifold Modules Major Market Trends

Table 13. World Subsea Manifold Modules Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Subsea Manifold Modules Consumption by Region (2021-2026) & (Units)

Table 15. World Subsea Manifold Modules Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Subsea Manifold Modules Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Subsea Manifold Modules Producers in 2025

Table 18. World Subsea Manifold Modules Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Subsea Manifold Modules Producers in 2025

Table 20. World Subsea Manifold Modules Average Price by Manufacturer (2021-2026)

& (US\$/Unit)

Table 21. Global Subsea Manifold Modules Company Evaluation Quadrant

Table 22. World Subsea Manifold Modules Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Subsea Manifold Modules Production Site of Key Manufacturer

Table 24. Subsea Manifold Modules Market: Company Product Type Footprint

Table 25. Subsea Manifold Modules Market: Company Product Application Footprint

Table 26. Subsea Manifold Modules Competitive Factors

Table 27. Subsea Manifold Modules New Entrant and Capacity Expansion Plans

Table 28. Subsea Manifold Modules Mergers & Acquisitions Activity

Table 29. United States VS China Subsea Manifold Modules Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Subsea Manifold Modules Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Subsea Manifold Modules Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Subsea Manifold Modules Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Subsea Manifold Modules Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Subsea Manifold Modules Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Subsea Manifold Modules Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Subsea Manifold Modules Production Market Share (2021-2026)

Table 37. China Based Subsea Manifold Modules Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Subsea Manifold Modules Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Subsea Manifold Modules Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Subsea Manifold Modules Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Subsea Manifold Modules Production Market Share (2021-2026)

Table 42. Rest of World Based Subsea Manifold Modules Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Subsea Manifold Modules Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Subsea Manifold Modules Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Subsea Manifold Modules Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Subsea Manifold Modules Production Market Share (2021-2026)

Table 47. World Subsea Manifold Modules Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Subsea Manifold Modules Production by Type (2021-2026) & (Units)

Table 49. World Subsea Manifold Modules Production by Type (2027-2032) & (Units)

Table 50. World Subsea Manifold Modules Production Value by Type (2021-2026) & (USD Million)

Table 51. World Subsea Manifold Modules Production Value by Type (2027-2032) & (USD Million)

Table 52. World Subsea Manifold Modules Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Subsea Manifold Modules Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Subsea Manifold Modules Production Value by Water Depth, (USD Million), 2021 & 2025 & 2032

Table 55. World Subsea Manifold Modules Production by Water Depth (2021-2026) & (Units)

Table 56. World Subsea Manifold Modules Production by Water Depth (2027-2032) & (Units)

Table 57. World Subsea Manifold Modules Production Value by Water Depth (2021-2026) & (USD Million)

Table 58. World Subsea Manifold Modules Production Value by Water Depth (2027-2032) & (USD Million)

Table 59. World Subsea Manifold Modules Average Price by Water Depth (2021-2026) & (US\$/Unit)

Table 60. World Subsea Manifold Modules Average Price by Water Depth (2027-2032) & (US\$/Unit)

Table 61. World Subsea Manifold Modules Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Subsea Manifold Modules Production by Application (2021-2026) & (Units)

Table 63. World Subsea Manifold Modules Production by Application (2027-2032) &

(Units)

Table 64. World Subsea Manifold Modules Production Value by Application (2021-2026) & (USD Million)

Table 65. World Subsea Manifold Modules Production Value by Application (2027-2032) & (USD Million)

Table 66. World Subsea Manifold Modules Average Price by Application (2021-2026) & (US\$/Unit)

Table 67. World Subsea Manifold Modules Average Price by Application (2027-2032) & (US\$/Unit)

Table 68. TechnipFMC Basic Information, Manufacturing Base and Competitors

Table 69. TechnipFMC Major Business

Table 70. TechnipFMC Subsea Manifold Modules Product and Services

Table 71. TechnipFMC Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. TechnipFMC Recent Developments/Updates

Table 73. TechnipFMC Competitive Strengths & Weaknesses

Table 74. OneSubsea Basic Information, Manufacturing Base and Competitors

Table 75. OneSubsea Major Business

Table 76. OneSubsea Subsea Manifold Modules Product and Services

Table 77. OneSubsea Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. OneSubsea Recent Developments/Updates

Table 79. OneSubsea Competitive Strengths & Weaknesses

Table 80. Baker Hughes Basic Information, Manufacturing Base and Competitors

Table 81. Baker Hughes Major Business

Table 82. Baker Hughes Subsea Manifold Modules Product and Services

Table 83. Baker Hughes Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Baker Hughes Recent Developments/Updates

Table 85. Baker Hughes Competitive Strengths & Weaknesses

Table 86. Innovex International Basic Information, Manufacturing Base and Competitors

Table 87. Innovex International Major Business

Table 88. Innovex International Subsea Manifold Modules Product and Services

Table 89. Innovex International Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. Innovex International Recent Developments/Updates

Table 91. Innovex International Competitive Strengths & Weaknesses

Table 92. Trendsetter Engineering Basic Information, Manufacturing Base and

Competitors

Table 93. Trendsetter Engineering Major Business

Table 94. Trendsetter Engineering Subsea Manifold Modules Product and Services

Table 95. Trendsetter Engineering Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 96. Trendsetter Engineering Recent Developments/Updates

Table 97. Trendsetter Engineering Competitive Strengths & Weaknesses

Table 98. Worldwide Oilfield Machine Basic Information, Manufacturing Base and Competitors

Table 99. Worldwide Oilfield Machine Major Business

Table 100. Worldwide Oilfield Machine Subsea Manifold Modules Product and Services

Table 101. Worldwide Oilfield Machine Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 102. Worldwide Oilfield Machine Recent Developments/Updates

Table 103. Worldwide Oilfield Machine Competitive Strengths & Weaknesses

Table 104. COOEC Basic Information, Manufacturing Base and Competitors

Table 105. COOEC Major Business

Table 106. COOEC Subsea Manifold Modules Product and Services

Table 107. COOEC Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 108. COOEC Recent Developments/Updates

Table 109. COOEC Competitive Strengths & Weaknesses

Table 110. Larsen & Toubro Limited Basic Information, Manufacturing Base and Competitors

Table 111. Larsen & Toubro Limited Major Business

Table 112. Larsen & Toubro Limited Subsea Manifold Modules Product and Services

Table 113. Larsen & Toubro Limited Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. Larsen & Toubro Limited Recent Developments/Updates

Table 115. Larsen & Toubro Limited Competitive Strengths & Weaknesses

Table 116. McDermott International Basic Information, Manufacturing Base and Competitors

Table 117. McDermott International Major Business

Table 118. McDermott International Subsea Manifold Modules Product and Services

Table 119. McDermott International Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 120. McDermott International Recent Developments/Updates

Table 121. McDermott International Competitive Strengths & Weaknesses

Table 122. Deepsea Technologies, Inc Basic Information, Manufacturing Base and Competitors

Table 123. Deepsea Technologies, Inc Major Business

Table 124. Deepsea Technologies, Inc Subsea Manifold Modules Product and Services

Table 125. Deepsea Technologies, Inc Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. Deepsea Technologies, Inc Recent Developments/Updates

Table 127. Deepsea Technologies, Inc Competitive Strengths & Weaknesses

Table 128. NOV Inc. Basic Information, Manufacturing Base and Competitors

Table 129. NOV Inc. Major Business

Table 130. NOV Inc. Subsea Manifold Modules Product and Services

Table 131. NOV Inc. Subsea Manifold Modules Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 132. NOV Inc. Recent Developments/Updates

Table 133. NOV Inc. Competitive Strengths & Weaknesses

Table 134. Global Key Players of Subsea Manifold Modules Upstream (Raw Materials)

Table 135. Global Subsea Manifold Modules Typical Customers

Table 136. Subsea Manifold Modules Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Subsea Manifold Modules Picture

Figure 2. World Subsea Manifold Modules Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Subsea Manifold Modules Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Subsea Manifold Modules Production (2021-2032) & (Units)

Figure 5. World Subsea Manifold Modules Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Subsea Manifold Modules Production Value Market Share by Region (2021-2032)

Figure 7. World Subsea Manifold Modules Production Market Share by Region (2021-2032)

Figure 8. North America Subsea Manifold Modules Production (2021-2032) & (Units)

Figure 9. Europe Subsea Manifold Modules Production (2021-2032) & (Units)

Figure 10. China Subsea Manifold Modules Production (2021-2032) & (Units)

Figure 11. Subsea Manifold Modules Market Drivers

Figure 12. Factors Affecting Demand

Figure 13. World Subsea Manifold Modules Consumption (2021-2032) & (Units)

Figure 14. World Subsea Manifold Modules Consumption Market Share by Region (2021-2032)

Figure 15. United States Subsea Manifold Modules Consumption (2021-2032) & (Units)

Figure 16. China Subsea Manifold Modules Consumption (2021-2032) & (Units)

Figure 17. Europe Subsea Manifold Modules Consumption (2021-2032) & (Units)

Figure 18. Japan Subsea Manifold Modules Consumption (2021-2032) & (Units)

Figure 19. South Korea Subsea Manifold Modules Consumption (2021-2032) & (Units)

Figure 20. ASEAN Subsea Manifold Modules Consumption (2021-2032) & (Units)

Figure 21. India Subsea Manifold Modules Consumption (2021-2032) & (Units)

Figure 22. Producer Shipments of Subsea Manifold Modules by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 23. Global Four-firm Concentration Ratios (CR4) for Subsea Manifold Modules Markets in 2025

Figure 24. Global Four-firm Concentration Ratios (CR8) for Subsea Manifold Modules Markets in 2025

Figure 25. United States VS China: Subsea Manifold Modules Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 26. United States VS China: Subsea Manifold Modules Production Market Share

Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Subsea Manifold Modules Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States Based Manufacturers Subsea Manifold Modules Production Market Share 2025

Figure 29. China Based Manufacturers Subsea Manifold Modules Production Market Share 2025

Figure 30. Rest of World Based Manufacturers Subsea Manifold Modules Production Market Share 2025

Figure 31. World Subsea Manifold Modules Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 32. World Subsea Manifold Modules Production Value Market Share by Type in 2025

Figure 33. Production Manifolds

Figure 34. Injection Manifolds

Figure 35. Others

Figure 36. World Subsea Manifold Modules Production Market Share by Type (2021-2032)

Figure 37. World Subsea Manifold Modules Production Value Market Share by Type (2021-2032)

Figure 38. World Subsea Manifold Modules Average Price by Type (2021-2032) & (US\$/Unit)

Figure 39. World Subsea Manifold Modules Production Value by Water Depth, (USD Million), 2021 & 2025 & 2032

Figure 40. World Subsea Manifold Modules Production Value Market Share by Water Depth in 2025

Figure 41. Shallow-Water Manifold Modules

Figure 42. Deepwater Manifold Modules

Figure 43. Ultra-Deepwater Manifold Modules

Figure 44. World Subsea Manifold Modules Production Market Share by Water Depth (2021-2032)

Figure 45. World Subsea Manifold Modules Production Value Market Share by Water Depth (2021-2032)

Figure 46. World Subsea Manifold Modules Average Price by Water Depth (2021-2032) & (US\$/Unit)

Figure 47. World Subsea Manifold Modules Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 48. World Subsea Manifold Modules Production Value Market Share by Application in 2025

Figure 49. Deepwater Oil & Gas Production

Figure 50. Subsea Tieback Projects

Figure 51. Multi-well Cluster Development

Figure 52. Brownfield Expansion & Redevelopment

Figure 53. Others

Figure 54. World Subsea Manifold Modules Production Market Share by Application (2021-2032)

Figure 55. World Subsea Manifold Modules Production Value Market Share by Application (2021-2032)

Figure 56. World Subsea Manifold Modules Average Price by Application (2021-2032) & (US\$/Unit)

Figure 57. Subsea Manifold Modules Industry Chain

Figure 58. Subsea Manifold Modules Procurement Model

Figure 59. Subsea Manifold Modules Sales Model

Figure 60. Subsea Manifold Modules Sales Channels, Direct Sales, and Distribution

Figure 61. Methodology

Figure 62. Research Process and Data Source

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