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Global Jetting Sled Market Growth 2026-2032

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Abstracts

The global Jetting Sled market size is predicted to grow from US$ 188 million in 2025 to US$ 280 million in 2032; it is expected to grow at a CAGR of 5.9% from 2026 to 2032.

In 2024, global Jetting Sled production reached approximately 135 units, with an average global market price of around 1.35 M USD per unit.

A Jetting Sled is a specialized subsea operation equipment designed for seabed trenching, sediment scouring, or pipeline/cable burial, typically deployed in offshore wind power, oil and gas exploration, and marine communication projects. It integrates high-pressure jetting systems (equipped with multiple nozzles), a buoyancy-adjustable sled body, and traction or self-propelled mechanisms (such as crawler tracks or hydraulic propellers), relying on high-pressure water jets to erode seabed soil and form standardized trenches, while adapting to diverse seabed terrains (sandy, muddy, or gravelly seabeds) through its low-ground-pressure structure. Equipped with underwater positioning sensors, pressure compensation systems, and real-time communication modules, it coordinates with surface mother ships via umbilical cables to achieve precise control of trenching depth (usually 1-5 meters) and width, ensuring efficient and stable subsea infrastructure installation and protection.

The cost structure of Jetting Sleds is dominated by core functional components and marine-grade specialized systems, with a clear weight distribution: high-pressure jetting and power systems (high-pressure pumps, corrosion-resistant nozzles, hydraulic power units, and submersible motors) account for the largest proportion at approximately 38%-42% of the total cost, as these components directly determine jetting efficiency, pressure stability (typically 15-30MPa), and adaptability to deep-sea environments. Marine-grade structural and material costs (titanium alloy, marine-grade stainless steel 316L, and composite anti-corrosion materials for the sled body, as well as pressure-resistant seals) follow, occupying 25%-28% of the cost, with anti-corrosion and pressure-

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resistant performance being key cost drivers to withstand deep-sea pressure (up to 500m water depth) and saltwater erosion. R&D and engineering design costs (including hydrodynamic optimization, trench precision control algorithms, and compatibility with subsea operation scenarios) make up 14%-16%, reflecting the high technical threshold of integrating jetting, positioning, and deep-sea adaptation functions. Manufacturing and assembly costs (precision welding, modular integration, pressure testing, and underwater sealing processing) account for 10%-12%, requiring specialized cleanroom and pressure-testing facilities. Quality inspection and marine certification costs (including DNV GL or ABS classification society certification, corrosion resistance testing, and operational reliability verification) occupy 7%-9%, while logistics (marine transportation, on-vessel deployment) and after-sales technical support (maintenance training, spare parts supply) costs account for 3%-4%, varying with equipment specifications and project locations.?

The industry chain of Jetting Sleds is a closely collaborative ecosystem spanning upstream, midstream, and downstream segments. The upstream segment focuses on raw material and component supply: raw material suppliers provide marine-grade alloys (titanium alloy, stainless steel), composite anti-corrosion materials, and high-pressure resistant plastics; core component suppliers deliver high-pressure pumps, submersible motors, precision positioning sensors (GPS/underwater acoustic positioning modules), hydraulic control valves, and umbilical cables (led by enterprises like Ningbo Orient Cable), with specialized deep-sea equipment component manufacturers ensuring product pressure resistance and corrosion resistance. The midstream segment consists of specialized marine engineering equipment manufacturers and R&D institutions (such as Deep Sea Intelligence, Osbit, and domestic enterprises like Guangzhou Nanhai Zhiren), which undertake product design (customizing for trenching depth, jetting pressure, and seabed type), integrate upstream components, conduct strict performance testing (including land-based simulation and offshore sea trials), and produce finished Jetting Sleds that meet offshore project standards. Many midstream enterprises also provide integrated solutions including on-site operation guidance and equipment commissioning. The downstream segment includes end-users and project contractors: end-users cover offshore wind power developers, oil and gas exploration companies, and marine communication operators; project contractors (offshore engineering firms like Van Oord and CNOOC Engineering) purchase and deploy the equipment for subsea pipeline/cable burial and seabed trenching projects. Sales channels mainly include direct enterprise sales and cooperative bidding for large-scale offshore projects. Additionally, downstream demand driven by global offshore wind power expansion and deep-sea resource development promotes midstream technological upgrading (such as improving intelligent cruise control and jetting

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efficiency), while upstream material innovation (more durable anti-corrosion composites) and strict marine safety regulations further drive the development of high-reliability, high-efficiency Jetting Sled products.

The single-line production capacity of Jetting Sled is 16 to 19 units per year, the average gross profit margin was 28.2%.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Jetting Sled Industry Forecast” looks at past sales and reviews total world Jetting Sled sales in 2025, providing a comprehensive analysis by region and market sector of projected Jetting Sled sales for 2026 through 2032. With Jetting Sled sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Jetting Sled industry.

This Insight Report provides a comprehensive analysis of the global Jetting Sled landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Jetting Sled portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Jetting Sled market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Jetting Sled and breaks down the forecast by Function Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Jetting Sled.

This report presents a comprehensive overview, market shares, and growth opportunities of Jetting Sled market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Function Type:

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Cable Burial Sled

Pipeline Burial Sled

Umbilical Burial Sled

Multifunctional Jetting Sled

Segmentation by Jetting Method:

Water Jet Type

Air Jet Type

Combined Jet Type

Segmentation by Operating Depth:

Shallow Water Type (0–100 m)

Mid-Depth Type (100–1000 m)

Deep Water Type (Over 1000 m)

Segmentation by Application:

Subsea Construction

Subsea Telecommunication

This report also splits the market by region:

Americas

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United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

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Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Royal IHC

LS Marine Solution

ETA

Seatools

Soil Machine Dynamics (SMD)

ASSO

OCS

Key Questions Addressed in this Report

What is the 10-year outlook for the global Jetting Sled market?

What factors are driving Jetting Sled market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Jetting Sled market opportunities vary by end market size?

How does Jetting Sled break out by Function Type, by Application?

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