

Global NDT Services for Subsea Infrastructure Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global NDT Services for Subsea Infrastructure market size is predicted to grow from US\$ 1712 million in 2025 to US\$ 2778 million in 2032; it is expected to grow at a CAGR of 7.1% from 2026 to 2032.

NDT Services for Subsea Infrastructure utilizes non-invasive technologies such as underwater robots, sonar, laser scanning, and magnetic sensing to conduct remote, in-situ condition assessments and defect identification of subsea oil and gas pipelines, cables, fiber optic cables, and platform structures. By acquiring high-precision geometric, corrosion, coating damage, and structural integrity data in harsh marine environments, it addresses the core challenges of traditional inspection methods, which rely on divers, are high-risk, inefficient, and provide incomplete data. This service can accurately locate potential faults and predict remaining lifespan without interrupting operations or damaging the structure, directly assisting operators in developing scientific maintenance strategies and preventing catastrophic leaks and fractures. It is a key technological guarantee for ensuring the safety of subsea assets, reducing operational risks and insurance costs, and ensuring the reliability of energy and communication networks.

The NDT Services for Subsea Infrastructure industry chain is clear: upstream are specialized equipment and technology providers (such as ROV manufacturers, specialized sonar and sensor companies), and downstream are asset operators directly applying these technologies in oil and gas, telecommunications, and offshore wind power. Global prices are extremely high, with a single ROV inspection project typically costing between \$500,000 and several million US dollars, and large-scale comprehensive inspection contracts reaching tens of millions of US dollars. Costs are highly concentrated in the day fees for specialized vessels and ROV operations,

depreciation and maintenance of cutting-edge inspection equipment, and the high cost of experienced data engineers and underwater experts. The industry's gross profit margins are wide, with technology-driven data services around 40-60%, while the gross profit margin for asset-heavy, high-day-fee vessel operations is lower (around 15-30%). Profitability relies primarily on technological proprietaryness, project execution efficiency, and the ability to extend into high-end consulting services such as integrity management and life assessment.

United States market for NDT Services for Subsea Infrastructure is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for NDT Services for Subsea Infrastructure is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for NDT Services for Subsea Infrastructure is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key NDT Services for Subsea Infrastructure players cover AISUS, Applus+, Eddyfi Technologies, FORCE Technology, Geo Oceans, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for NDT Services for Subsea Infrastructure and breaks down the forecast by 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 NDT Services for Subsea Infrastructure.

This report presents a comprehensive overview, market shares, and growth opportunities of NDT Services for Subsea Infrastructure market by product type, application, key players and key regions and countries.

Segmentation by Type:

Traditional NDT Services

Advanced NDT Services

Segmentation by Technology:

ROV-Equipped Detection

Acoustic and Sonar Imaging

Magnetic Field and Electromagnetic Detection

Optical and Laser Scanning

Others

Segmentation by Service Depth:

Regular Inspection Service

Emergency Investigation and Location Service

Engineering Support and Post-Construction Handover Service

Others

Segmentation by Application:

Oil and Gas

Telecommunications

Offshore Wind Power

Marine Engineering

Others

This report also splits the market by region:

Americas

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

Israel

Turkey

GCC Countries

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

AISUS

Applus+

Eddyfi Technologies

FORCE Technology

Geo Oceans

Harcam Marine

Leask Marine

MISTRAS Group

NDT Scan

Oceaneering

Phoenix

SGS SA

Sonomatic

TSC Subsea

Tubecare

Ven-Tech Subsea

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