

# Global Subsea IMR Service Market Growth (Status and Outlook) 2026-2032

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## Abstracts

The global Subsea IMR Service market size is predicted to grow from US\$ 6865 million in 2025 to US\$ 13140 million in 2032; it is expected to grow at a CAGR of 9.4% from 2026 to 2032.

Subsea IMR (Inspection, Maintenance, and Repair) services encompass a range of activities aimed at ensuring the integrity and functionality of subsea infrastructure. These services are crucial for the offshore oil & gas and increasingly the renewable energy sectors, focusing on maintaining, repairing, and inspecting subsea equipment and structures.

IMR services initially served the offshore oil and gas industry, ensuring the safety of production facilities such as platforms and subsea pipelines. In recent years, with the rapid development of offshore renewable energy (such as wind farms), demand for IMR of submarine cables, turbine foundations, and other equipment has grown rapidly.

IMR services rely heavily on specialized equipment. Remotely operated vehicles (ROVs) are typically powered and controlled by surface vessels and can carry robotic arms, various tools, and sensors to perform precise inspection, maintenance, and repair tasks. Autonomous underwater vehicles (AUVs), more like underwater drones, can be pre-programmed to autonomously conduct large-scale surveys and mapping, efficiently collecting data.

To reduce operating costs, minimize human risk, and mitigate carbon emissions, the industry is actively exploring and deploying unmanned surface vessels (USVs). For example, one company plans to use USVs for subsea IMR operations starting in 2025, projecting a reduction of over 90% in CO2 emissions compared to traditional vessels.

Furthermore, the autonomous technology and sensor systems of AUVs and ROVs are continuously advancing, enabling them to perform tasks more efficiently and accurately in complex underwater environments.

The global Subsea IMR Service market exhibits a distinct regional distribution, with different sea areas showing varying market shares and growth drivers due to differences in energy development stages, infrastructure density, and policy environments. In 2024, Europe (especially the North Sea) maintained its leading position, contributing 32.18% of the global market share, benefiting from mature offshore oil and gas development activities and increasing demand for offshore wind power projects. North America (mainly the US Gulf Coast and Atlantic coast) accounted for 27.36% of the global market, benefiting from mature oil and gas facilities and rapid expansion of offshore wind power. The Asia-Pacific region has experienced rapid growth in recent years, with major countries including China, Japan, South Korea, and Australia, and is expected to maintain high growth in the future. The Middle East and Africa are mainly driven by the demand for offshore oil and gas development and infrastructure maintenance in Saudi Arabia, the UAE, and Nigeria. Latin America, especially Brazil and Mexico, is also driving the development of its local IMR market, but its overall size is slightly smaller than that of Asia. Overall, Europe and North America remain the core markets for global Subsea IMR Services, while the Asia-Pacific region is significantly outpacing other regions in terms of market growth due to the rapid advancement of emerging energy projects and infrastructure construction. As the global energy structure shifts towards low-carbon and renewable energy, the demand for subsea wind power, cable maintenance, and intelligent monitoring services will further increase in various regions, driving continuous optimization and structural adjustment of market share.

Major companies in the global Subsea IMR Service market include TechnipFMC, Oceaneering International, DOF Group ASA, Subsea 7, Helix Energy Solutions, DeepOcean, Offshore Oil Engineering, Boskalis, Reach Subsea, Bourbon Offshore, Fugro, Cyan Renewables, and Asso.subsea. In 2024, these companies had a high market share concentration, with the major players accounting for over 48.75% of the total. In the coming years, with technological upgrades, improved digitalization and remote operation capabilities, and the continued development of offshore renewable energy projects and deepwater oil and gas operations, industry competition will intensify further. Companies will place greater emphasis on integrated service capabilities, full lifecycle management, and the application of low-carbon and sustainable technologies. Particularly in the Chinese and Asia-Pacific markets, more strategic partnerships, mergers and acquisitions, and technological innovations are expected to emerge to

seize market share and enhance service value.

From a product structure perspective, global Subsea IMR services can be divided into three main categories: inspection services, maintenance services, and repair services. Inspection services are primarily used for asset integrity assessment and early fault identification; maintenance services cover daily operational support and routine inspections; and repair services focus on complex operations, subsea facility repair, and wellhead intervention—high-tech tasks. These three service categories collectively support the operational needs of subsea facilities throughout their entire lifecycle, forming a complementary and mutually reinforcing market structure.

In terms of application areas, Subsea IMR services mainly cover oil and gas, power and renewable energy, and other industrial applications. The oil and gas sector still holds the largest share and is the main driver of market growth, accounting for 82.54% of the market in 2024. The power and renewable energy market is also showing a rapid expansion trend with the accelerated development of offshore wind power and new energy sources. Other application areas include subsea communications and utility projects, whose market potential is gradually being realized.

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

This Insight Report provides a comprehensive analysis of the global Subsea IMR Service 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 Subsea IMR Service portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Subsea IMR Service market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Subsea IMR Service 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 Subsea IMR Service.

This report presents a comprehensive overview, market shares, and growth opportunities of Subsea IMR Service market by product type, application, key players and key regions and countries.

### **Segmentation by Type:**

Inspection

Maintenance

Repair

### **Segmentation by Vehicle Platform:**

Surface Vessel-Based

Unmanned Surface Vehicle-Based

Drilling Platform or Floating Production Facility-Based

Subsea Crawler/Docking Station-Based

### **Segmentation by Operational Planning:**

Planned IMR

Emergency IMR

### **Segmentation by Level of Technical Involvement:**

Non-Intrusive Inspection

Intrusive Maintenance

Light Repair

Heavy/Structural Repair

**Segmentation by Application:**

Oil and Gas

Utilities

Renewable Energy

Telecommunications

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.

TechnipFMC

Oceaneering International

DOF Group ASA

Subsea 7

Helix Energy Solutions

DeepOcean

Offshore Oil Engineering Co., Ltd

Boskalis

Reach Subsea

Bourbon Offshore

Fugro

Cyan Renewables

Asso.subsea

Prysmian Group

Baker Hughes

Bhagwan Marine

International Ocean Group

Kongsberg Maritime

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