

Flexible Pipe Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Raw Material (High-density Polyethylene, Polyamides, Polyvinylidene Fluoride), Application (Offshore and Onshore), By Region, Competition 2018-2028.

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Abstracts

Global Flexible Pipe Market has valued at USD 1.19 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 4.93% through 2028. Flexible pipes and tubes are widely used to transport oils or other liquids from one location to the other, especially through the seabed, or at construction sites and ores. Due to benefits like high-pressure control, lightweight, leak resistance, and lower price, flexible pipes are being used across industry verticals. The technical and cost advantages these pipes offer, are expected to replace the usage of steel equipment for new exploration activities at a greater pace over the forecast period.

Key Market Drivers

Oil and Gas Industry Growth

The growth of the oil and gas industry plays a pivotal role in driving the global flexible pipe market. These flexible pipes are indispensable components in the exploration, production, and transportation of hydrocarbons, especially in challenging offshore and deepwater environments. Several key factors underscore the symbiotic relationship between the oil and gas industry's expansion and the burgeoning demand for flexible pipes. Firstly, the relentless global demand for energy continues to drive oil and gas exploration efforts. As conventional reserves become depleted, the industry has shifted its focus to more remote and challenging locations, such as deepwater and subsea reserves. In these environments, traditional rigid pipelines are often impractical or cost-

prohibitive, making flexible pipes the preferred choice for their adaptability to underwater topography and ability to withstand harsh conditions.

Secondly, technological advancements have revolutionized the performance and durability of flexible pipes. With the development of innovative materials and manufacturing processes, these pipes have become more reliable and cost-effective. They offer excellent corrosion resistance and fatigue life, making them well-suited for extended service in offshore and subsea applications. Moreover, environmental considerations have elevated the significance of flexible pipes. In comparison to rigid pipelines, flexible pipes have a lower environmental impact during installation and operation. In an era marked by heightened environmental consciousness and stringent regulations, the oil and gas industry seeks sustainable solutions, and flexible pipes align with this objective.

Additionally, the cost-efficiency of flexible pipes is a compelling driver. Their flexibility streamlines installation and maintenance processes, reducing project costs and operational downtime. This cost-effectiveness is particularly advantageous in an industry where efficiency and profitability are paramount. In conclusion, the growth of the oil and gas industry is inextricably linked to the global flexible pipe market. As the demand for energy continues to rise and exploration ventures extend into more challenging environments, flexible pipes emerge as indispensable components, offering adaptability, durability, and cost-efficiency. Moreover, their environmental benefits align with the industry's evolving sustainability goals. Therefore, the oil and gas industry's expansion is a cornerstone driver fueling the continued growth and innovation within the global flexible pipe market.

Deepwater Exploration

Deepwater exploration stands as a formidable catalyst propelling the global flexible pipe market forward. This dynamic industry trend has created an increasing demand for flexible pipes, which are instrumental in facilitating the extraction of oil and gas from the depths of the ocean. Several factors contribute to the significant influence of deepwater exploration on the flexible pipe market, Challenging Environments: Deepwater environments, characterized by extreme pressures, temperatures, and corrosive conditions, require specialized equipment. Flexible pipes excel in these conditions due to their ability to adapt to the dynamic seabed, resist corrosion, and withstand harsh elements.

Vast Reserves: As traditional onshore and shallow-water reserves become depleted,

the industry has turned its attention to deepwater reservoirs, which are estimated to hold substantial untapped hydrocarbon reserves. Accessing these resources necessitates the use of flexible pipes to transport oil and gas safely to the surface. Technological Advancements: Ongoing innovations in materials and manufacturing technologies have enhanced the performance and reliability of flexible pipes. These advancements ensure that they can withstand the unique challenges posed by deepwater exploration, including high-pressure environments and complex subsea architectures.

Reduced Environmental Impact: Flexible pipes offer a more environmentally friendly solution compared to traditional rigid pipelines when it comes to deepwater applications. Their flexible nature allows for easier installation, reducing the disruption to marine ecosystems, and they are designed to minimize the risk of oil spills. Global Expansion: Deepwater exploration is not limited to a specific region; it is a global endeavor. As countries worldwide invest in offshore drilling and exploration projects, the demand for flexible pipes continues to grow on a global scale. Cost-Effectiveness: In deepwater projects, cost-efficiency is crucial. Flexible pipes are known for their cost-effective installation and maintenance, as they can be deployed with less complexity and shorter lead times than rigid alternatives.

In conclusion, deepwater exploration is a driving force behind the global flexible pipe market's expansion. The unique challenges posed by deepwater environments, combined with the vast reserves and global reach of these exploration projects, make flexible pipes an indispensable component in the offshore oil and gas industry. Furthermore, ongoing technological advancements and a commitment to environmental sustainability contribute to the enduring relevance of flexible pipes in the context of deepwater exploration. As the world's energy needs continue to evolve, the synergy between deepwater exploration and flexible pipe technology remains a pivotal factor in shaping the future of the oil and gas industry.

Technological Advancements

Technological advancements are a driving force behind the growth and evolution of the global flexible pipe market. These innovations continually enhance the performance, durability, and versatility of flexible pipes, making them indispensable in a variety of industries, including oil and gas, offshore renewables, and more. Several key technological advancements fueling the expansion of the flexible pipe market include, Advanced Materials: The development of new materials, such as high-strength composite polymers and corrosion-resistant alloys, has significantly improved the

durability and performance of flexible pipes. These materials can withstand harsh environments, including corrosive subsea conditions and extreme temperatures.

Manufacturing Techniques: Innovations in manufacturing processes, such as extrusion, helical winding, and composite wrapping, have increased the quality and efficiency of flexible pipe production. These advancements ensure that flexible pipes meet stringent industry standards while remaining cost-effective. **Enhanced Design and Simulation Tools:** The use of sophisticated design and simulation software allows engineers to optimize the design of flexible pipes, ensuring they can withstand the specific conditions of their intended application. This results in pipes that are more reliable and tailored to the needs of the industry. **Integrated Monitoring and Inspection Technologies:** Advanced sensors and inspection technologies are integrated into flexible pipes to enable real-time monitoring and condition assessment. This helps operators detect potential issues early, reducing downtime and maintenance costs.

Innovations in Sealing and Connection Technologies: Improved sealing and connection technologies ensure the integrity of flexible pipe systems. This is crucial for preventing leaks and maintaining safety and efficiency in demanding applications. **Subsea Robotics:** The use of remotely operated vehicles (ROVs) and autonomous underwater vehicles (AUVs) equipped with advanced inspection and maintenance capabilities allows for the assessment and repair of flexible pipes in challenging subsea environments. **Digitalization and Data Analytics:** Digital technologies and data analytics are transforming how flexible pipes are managed. Predictive maintenance and data-driven insights help operators optimize the performance and lifespan of their flexible pipe systems. **Environmentally Friendly Solutions:** Research into environmentally friendly materials and manufacturing processes aligns with the global shift toward sustainability. This includes efforts to reduce the environmental impact of flexible pipe production and usage.

Customization and Modular Design: Flexible pipes can be customized and designed with modular components to meet specific project requirements, reducing lead times and improving overall project efficiency. These technological advancements collectively contribute to the growth of the global flexible pipe market by enhancing the pipes' capabilities, expanding their applications, and ensuring they remain a competitive choice in various industries. As technology continues to advance, the potential for further innovation in flexible pipe design and production remains promising, reinforcing their vital role in modern infrastructure and energy projects.

Key Market Challenges

Price Volatility of Raw Materials:

The price volatility of raw materials poses a significant challenge to the global flexible pipe market, impacting various aspects of the industry from production costs to profitability and market stability. Flexible pipes rely on a range of materials, including polymers, composites, and specialty alloys, making them susceptible to fluctuations in the prices of these essential inputs. Here's how the price volatility of raw materials can hamper the flexible pipe market, Production Costs: Fluctuations in the prices of raw materials directly affect production costs. When material prices rise, it increases the overall cost of manufacturing flexible pipes. These increased costs can be challenging for manufacturers to absorb without passing them on to customers.

Competitive Pricing: In a competitive market, manufacturers may face pressure to maintain competitive pricing. Rapid increases in raw material costs can erode profit margins, making it difficult for companies to remain competitive without compromising quality. **Supply Chain Disruptions:** Price volatility can lead to supply chain disruptions. Manufacturers may struggle to secure a consistent supply of raw materials at stable prices, potentially leading to delays in production and project timelines. **Profitability:** Profitability is a key concern for companies in the flexible pipe market. Price fluctuations in raw materials can impact profit margins, making it challenging for businesses to maintain financial stability and growth.

Project Budgets: For industries such as oil and gas, where flexible pipes are commonly used, project budgets are carefully managed. Unforeseen increases in the cost of flexible pipes due to raw material price volatility can strain project budgets, potentially leading to delays or cost overruns. **Risk Management:** Companies must implement effective risk management strategies to mitigate the impact of raw material price fluctuations. This can involve hedging, long-term supply agreements, or strategic sourcing, all of which can add complexity and cost to operations. **Consumer Pricing:** End-users, such as oil and gas companies, may experience cost pressures due to higher prices for flexible pipes. These increased costs can ultimately be passed on to consumers in the form of higher energy prices.

Investment Uncertainty: The uncertainty created by raw material price volatility can deter investors from entering or expanding within the flexible pipe market. This can limit the industry's ability to innovate and grow. **Global Economic Factors:** Broader economic factors, such as geopolitical tensions or global economic downturns, can exacerbate raw material price volatility, creating additional challenges for market stability. To

address these challenges, companies in the flexible pipe market often employ strategies such as diversifying their supplier base, developing long-term contracts with suppliers, and closely monitoring raw material markets. They may also invest in research and development to explore alternative materials that are less prone to price fluctuations or adopt cost-saving manufacturing techniques. Ultimately, managing raw material price volatility is essential for the industry's sustained growth and competitiveness.

Stringent Regulatory Compliance

Stringent regulatory compliance represents a significant challenge for the global flexible pipe market, posing potential hurdles and constraints that can impact the industry's growth and operations. While regulations are put in place to ensure safety, environmental protection, and product quality, they can also impose burdensome requirements on manufacturers and users of flexible pipes. Here's how stringent regulatory compliance can hamper the global flexible pipe market, **Complex Certification Processes:** Flexible pipes must undergo rigorous testing and certification processes to meet industry standards and regulatory requirements. These processes are often time-consuming and expensive, delaying product development and market entry.

High Compliance Costs: Ensuring compliance with stringent regulations can lead to increased production and operational costs. Manufacturers may need to invest in specialized equipment, materials, and quality control measures to meet regulatory demands, which can impact pricing and competitiveness. **Global Variability in Standards:** Regulations governing flexible pipes can vary significantly from one region to another. Manufacturers operating in multiple countries must navigate a complex web of standards and requirements, adding complexity and potential inconsistencies to their product offerings.

Environmental Impact Assessments: Deepwater and subsea projects, which are major users of flexible pipes, often require thorough environmental impact assessments. These assessments can lead to delays in project approvals and increased scrutiny of materials and production processes. **Evolving Environmental Regulations:** As environmental concerns grow, regulatory bodies may introduce stricter rules related to the materials, disposal, and emissions associated with flexible pipes. This requires continuous adaptation and potentially costly changes in manufacturing practices.

Product Liability and Safety Regulations: The use of flexible pipes in critical applications, such as oil and gas transport, means that they must adhere to strict safety and product liability regulations. Failures can lead to catastrophic consequences,

making compliance vital but challenging. Changing Quality Standards: Quality control and assurance are paramount in flexible pipe manufacturing. Meeting these standards consistently requires significant investments in testing and inspection processes. Market Entry Barriers: Stringent regulatory compliance can act as a barrier to entry for smaller companies, stifling competition and innovation in the flexible pipe market.

Trade Barriers: Exporting flexible pipes to countries with differing regulatory regimes can be complicated. Non-compliance with local regulations can result in market access issues and trade barriers. Despite these challenges, stringent regulatory compliance is essential to ensure the safety and reliability of flexible pipes, protect the environment, and uphold industry standards. Manufacturers and stakeholders in the flexible pipe market must invest in compliance measures, keep abreast of evolving regulations, and engage in proactive dialogue with regulatory bodies to navigate these challenges effectively while maintaining product quality and market competitiveness.

Key Market Trends

Growth in Deepwater Exploration

The automation and digitization trend is rapidly reshaping the Global Auger Drilling Market, offering numerous benefits that enhance efficiency, accuracy, and safety throughout drilling operations. Automation involves leveraging advanced technology and sensors to control and monitor drilling processes, thereby reducing the need for manual intervention and minimizing human error. Automation and digitization are revolutionizing various aspects of auger drilling, ranging from equipment operation to data collection and analysis. Automated drilling rigs are equipped with sophisticated control systems that optimize drilling parameters such as torque, rotation speed, and feed rate based on real-time geological data. This automation not only improves drilling efficiency but also minimizes equipment wear and tear. Digitization complements automation by facilitating the collection, storage, and analysis of drilling data. Sensors embedded in drilling equipment provide valuable insights into ground conditions, soil composition, and drilling performance. This data can be transmitted in real-time to centralized systems, enabling operators to make informed decisions and adjust drilling strategies as necessary. Moreover, the integration of augmented reality (AR) and virtual reality (VR) technologies is enhancing training programs and assisting operators in comprehending complex drilling scenarios. These technologies offer immersive experiences that help operators visualize drilling processes, troubleshoot issues, and simulate various drilling conditions. As the automation and digitization trend continues to evolve, the Global Auger Drilling Market will witness increased adoption of smart drilling equipment, data-

driven decision-making, and enhanced safety measures. The improved efficiency and accuracy resulting from these trends are expected to drive operational excellence and further propel the growth of the auger drilling industry.

Rising Offshore Renewable Energy

The rising prominence of offshore renewable energy projects, particularly offshore wind farms, is poised to be a powerful driver for the global flexible pipe market. This trend represents a significant shift in the demand dynamics for flexible pipes, expanding their applications beyond traditional sectors like oil and gas. Here's how the growing offshore renewable energy sector is driving the flexible pipe market, Subsea Cable Protection: Offshore wind farms require an intricate network of subsea power cables to transmit electricity generated by wind turbines to onshore grids. Flexible pipes play a crucial role in protecting and supporting these cables, shielding them from potential damage due to harsh marine conditions, corrosion, and physical stresses.

Power Transmission: Flexible pipes are used to connect underwater power cables to offshore substations. These pipes facilitate the efficient and reliable transmission of electricity from multiple wind turbines to the substation, ensuring uninterrupted power flow. **Seabed Connections:** Offshore renewable energy installations involve complex seabed connections, including the deployment of flexible pipes for hydraulic and electrical systems. These pipes allow for the safe and efficient operation of subsea equipment, such as pumps, valves, and sensors.

Cable Maintenance: As offshore wind farms expand, the maintenance and repair of subsea cables become critical. Flexible pipes enable access to these cables for inspection and maintenance purposes, reducing downtime and operational disruptions. **Harsh Environmental Conditions:** Offshore renewable energy projects are exposed to extreme environmental conditions, including strong currents, waves, and corrosive saltwater. Flexible pipes, designed to withstand such challenges, provide a reliable and durable solution for cable protection and seabed connections. **Scalability:** The offshore renewable energy sector is experiencing rapid growth, with larger and more powerful wind turbines being deployed. Flexible pipes offer scalability, allowing for the adaptation of cable protection systems to accommodate evolving industry requirements.

Technological Innovation: Ongoing technological advancements in the materials and manufacturing processes used in flexible pipes have enhanced their performance and durability, making them well-suited for offshore renewable energy applications.

Environmental Considerations: The environmental impact of offshore wind energy

projects is a key consideration. Flexible pipes, due to their low environmental footprint during installation and operation, align with the industry's sustainability goals and regulatory requirements.

Global Expansion: Offshore wind energy is expanding globally, with numerous countries investing in this clean energy source. This trend is driving the demand for flexible pipes in diverse geographic regions. In conclusion, the rising prominence of offshore renewable energy, particularly offshore wind farms, is reshaping the global flexible pipe market. These projects require durable and reliable solutions for cable protection, power transmission, and seabed connections, and flexible pipes are emerging as the preferred choice due to their adaptability and ability to withstand harsh marine conditions. As the offshore renewable energy sector continues to grow, the flexible pipe market is poised to experience sustained expansion, diversification, and technological innovation, solidifying its pivotal role in supporting the transition to cleaner and more sustainable energy sources.

Segmental Insights

Application Insights

Offshore segment is expected to dominate the market during the forecast period. The downstream product of oil and gas, i.e., petroleum, is widely used in cosmetic products. With the growth of disposable income and the increasing number of working women, the demand for cosmetics is increasing year-on-year.

This increasing demand for oil and gas requires effective transportation of oil and gas are under enormous physical and chemical stress. Further, the expansion of the transport sector by increasing the number of aviation carriers in the developed region as well as developing regions, along with the increase in the number of owners of passenger cars and vehicles will be driving the market for the oil industry. The need for oil and gas does not only restrict to vehicles but it is also widely used in industries for running machines as well. The transport sectors are the highest consumption oil and gas and thus, it will fuel the demand for flexible pipe market.

Regional Insights

North America is expected to dominate the market during the forecast period. The United States is the largest market for flexible pipes in North America. The country's newfound shale resources and government policies, which aim at making the country

the top oil and gas producer in the next few years, are expected to drive the demand for flexible pipes in the country.

For instance, with the US Department of Interior (DoI) planning to allow offshore exploratory drilling in about 90% of the outer continental shelf (OCS) acreage, under the National Outer Continental Shelf Oil and Gas Leasing Program (National OCS Program) for 2019-2024, the oil and gas sector in the region is expected to open up new opportunities to the market.

Further, according to the US Energy Information Administration, the United States will become a net energy exporter in 2020 and will remain so throughout the forecast period, as a result of large increases in crude oil, natural gas, and natural gas plant liquids (NGPL) production, coupled with slow growth in the US energy consumption. The increase in demand for oil and gas will, in turn, boost the flexible pipe market during the forecast period in North America.

Key Market Players

National Oilwell Varco (NOV)

TechnipFMC PLC

The Prysmian Group

GE Oil & Gas Corporation

Shawcor Ltd

SoulForce (Pipelife Nederland B.V.)

Airborne Oil & Gas BV

Magma Global Ltd

ContiTech AG

Chevron Phillips Chemical Company LLC

Report Scope:

In this report, the Global Flexible Pipe Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Flexible Pipe Market, By Raw Material:

High-density Polyethylene

Polyamides

Polyvinylidene Fluoride

Other Raw Materials

Global Flexible Pipe Market, By Application:

Offshore

Onshore

Global Flexible Pipe Market, By Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Flexible Pipe Market.

Available Customizations:

Global Flexible Pipe Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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