

# Global Land High Voltage Underground Cable Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Land High Voltage Underground Cable market size is expected to reach \$ 15310 million by 2032, rising at a market growth of 4.8% CAGR during the forecast period (2026-2032).

Land high voltage underground cables refer to fully enclosed power transmission systems with a rated voltage of 35kV and above, specifically laid in underground spaces on land (such as directly buried soil, underground utility tunnels, and cable tunnels). Different from overhead transmission lines, their core features include high-strength insulation structures and strong environmental adaptability, enabling safe and stable large-capacity power transmission under complex underground working conditions. As of December 2025, the average price of copper-core XLPE land high-voltage underground cables is approximately USD 15,000-80,000/km for 35-110kV, USD 120,000-180,000/km for 220kV, and USD 300,000-450,000/km for 500kV. The industrial chain: upstream covers raw material suppliers (copper/aluminum, XLPE, etc.); midstream includes cable and accessory manufacturers; downstream consists of power grid companies, municipal engineering and new energy project developers, with direct cost and demand transmission between links.

### Market Drivers

**Urbanization Advancement and Surging Power Load**The continuous concentration of urban population has expanded load centers, resulting in increasingly tight ground space. Traditional overhead lines not only occupy large areas and affect urban landscapes, but also fail to meet the high requirements for power supply reliability in core urban areas. Land high voltage underground cables have become the core choice for the construction and renovation of urban power grids due to their ability to achieve large-capacity power transmission in limited underground spaces, directly driving the growth of basic market demand.

**Booming Demand for New Energy Grid Connection**Most new energy power generation,

such as wind power and photovoltaic power, is concentrated in remote areas or offshore. Their large-scale grid connection requires long-distance and large-capacity transmission channels. Land high voltage underground cables can meet the concentrated transmission needs of new energy bases, and solve the problem of onshore connection and transmission after offshore wind power landing. As a key carrier for new energy power to connect to the main grid, new energy-related applications have become the fastest-growing segment of market demand.

**Strong Guidance from Policies and Power Grid Planning**Countries around the world have launched power grid upgrading strategies. For example, China has continued to increase investment in UHV projects during the '14th Five-Year Plan' period. Many regions have specified mandatory laying ratios of high voltage cables in underground utility tunnels. Relevant policies have directly released large-scale bidding demand, provided a clear path for market expansion, and promoted the standardized and regulated development of the industry.

**Transformation Driven by Safety and Environmental Constraints**Frequent extreme weather has increased the failure risk of overhead lines, while underground cables are less affected by external weather conditions and feature more stable operation and maintenance. In ecologically sensitive areas and densely populated areas, overhead lines have prominent environmental and safety hazards, making underground laying the mainstream alternative and further expanding the application boundaries of cables.

**Technological Iteration Enhancing Product Competitiveness**The continuous optimization of XLPE insulation material performance, and the gradual maturity of trenchless construction technology and intelligent online monitoring systems have not only improved transmission efficiency and operation safety, but also reduced the whole-life cycle cost. These technological advances have broken the traditional application limitations of underground cables, promoting their development towards the direction of extra-high voltage, ultra-high voltage and intelligence.

#### Market Challenges

**Significant High Cost and Capital Pressure**The initial investment of land high voltage underground cables is usually 3-5 times that of overhead lines. The prices of core raw materials such as copper and aluminum fluctuate sharply. In addition, the costs related to underground laying including utility tunnel construction and trenchless construction are relatively high. The overall project cost is substantial, resulting in a long project payback period, which not only brings capital pressure to construction parties, but also squeezes the profit margins of cable manufacturers.

**High Technical and Construction Barriers**Extra-high voltage and ultra-high voltage cables have strict requirements for insulation performance, thermal management capabilities and accessory reliability. The research and development of core technologies requires long-term and high investment. In the construction phase,

trenchless technology has high requirements for precision control. Complex underground geology (such as rock formations and areas with abundant groundwater) will further increase construction difficulty. Due to technical and capital constraints, small and medium-sized enterprises are difficult to enter the high-end market. Difficult Operation, Maintenance and Risk Control After cables are laid underground, fault location and maintenance are subject to space constraints. Once a fault occurs, troubleshooting and repair take a long time, which may lead to large-scale power outages. At the same time, the risk of external damage (such as construction and geological changes) is relatively high, requiring a complete supporting monitoring system. This not only increases operation and maintenance costs, but also puts forward higher requirements for the emergency response capabilities of power grids. This report studies the global Land High Voltage Underground Cable production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Land High Voltage Underground Cable 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 Land High Voltage Underground Cable that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Land High Voltage Underground Cable total production and demand, 2021-2032, (K Meter)

Global Land High Voltage Underground Cable total production value, 2021-2032, (USD Million)

Global Land High Voltage Underground Cable production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Meter), (based on production site)

Global Land High Voltage Underground Cable consumption by region & country, CAGR, 2021-2032 & (K Meter)

U.S. VS China: Land High Voltage Underground Cable domestic production, consumption, key domestic manufacturers and share

Global Land High Voltage Underground Cable production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Meter)

Global Land High Voltage Underground Cable production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Meter)

Global Land High Voltage Underground Cable production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Meter)

This report profiles key players in the global Land High Voltage Underground Cable 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 Prysmian Group, Nexans, Southwire, Hengtong Group, Furukawa Electric, Sumitomo Electric Industries, Qrunning Cable, LS Cable & System, Taihan Electric, Riyadh Cable, 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 Land High Voltage Underground Cable market

**Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Meter) and average price (K US\$/K Meter) 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 Land High Voltage Underground Cable Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Land High Voltage Underground Cable Market, Segmentation by Type:

HV

EHV

## Global Land High Voltage Underground Cable Market, Segmentation by Insulation Material:

XLPE

GIL

Others

## Global Land High Voltage Underground Cable Market, Segmentation by Conductor Material:

Copper Core

Aluminum Core

## Global Land High Voltage Underground Cable Market, Segmentation by Application:

Direct Current

Alternative Current

## **Companies Profiled:**

Prysmian Group

Nexans

Southwire

Hengtong Group

Furukawa Electric

Sumitomo Electric Industries

Qrunning Cable

LS Cable & System

Taihan Electric

Riyadh Cable

NKT Cables

Jeddah Cables

**Key Questions Answered:**

1. How big is the global Land High Voltage Underground Cable market?
2. What is the demand of the global Land High Voltage Underground Cable market?
3. What is the year over year growth of the global Land High Voltage Underground Cable market?
4. What is the production and production value of the global Land High Voltage Underground Cable market?
5. Who are the key producers in the global Land High Voltage Underground Cable market?
6. What are the growth factors driving the market demand?

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