

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

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## Abstracts

The global Multi-core Land High Voltage Underground Cable market size is expected to reach \$ 1759 million by 2032, rising at a market growth of 4.5% CAGR during the forecast period (2026-2032).

Multi-core land high voltage (HV) underground cables are HV power transmission cables integrated with 2 or more conductor cores, specially designed for underground laying scenarios in land-based power grids. Structurally composed of multiple sets of high-conductivity copper/aluminum conductors, phase-separated insulation layers, overall shielding layers, sheaths and metal armoring layers, cross-linked polyethylene (XLPE) serves as the mainstream insulation material. Their core function is to realize intensive underground transmission of multi-channel HV electric energy in scenarios such as urban distribution networks, industrial park power supply and building HV incoming lines. Featuring advantages including high laying efficiency, minimal underground space occupation and simplified line planning, they are core components for the underground transformation of medium and high-voltage distribution networks. The unit price ranges from \$80-\$1200 per meter, significantly affected by the number of cores, voltage grade, conductor cross-section and insulation material.

Basic 3-core 35kV cables with small cross-sections are priced at \$80-\$200 per meter; Mainstream 3-core 220kV cables with large cross-sections are sold at \$200-\$500 per meter;

Customized products with 5 or more cores, or models adopting high-temperature and corrosion-resistant special insulation materials, can reach \$500-\$1200 per meter;

Long-distance bulk purchases are eligible for a 10%-20% bargaining space.

Industry Chain Structure

Upstream: Consists of suppliers of core materials including copper/aluminum conductors, XLPE insulation compounds, shielding materials, metal armoring materials and cable accessories. Conductor purity and the voltage withstanding performance of

insulation materials directly determine the core quality of cables; the adaptability of cable accessories (joints, terminals) affects the operational stability of cable systems, with the high-end accessories market showing high concentration.

**Midstream:** Covers cable design, core stranding, phase-separated insulation extrusion, overall shielding and sheath coating, as well as finished product testing processes. All products need to pass stringent verification such as voltage withstanding tests, partial discharge tests and thermal cycle tests. Some leading enterprises have integrated R&D and supply capabilities of cables and accessories, and can provide overall solutions.

**Downstream:** Connects with power grid operators such as State Grid and China Southern Power Grid, industrial park developers, real estate developers and industrial enterprises. They are mainly applied in scenarios such as urban distribution network transformation, commercial complex HV power supply and industrial park ring network power supply. Downstream customers have high requirements for product reliability, delivery cycles and after-sales services, with stable long-term cooperative relationships.

#### Core Market Drivers

**Demand for intensive construction of urban distribution networks:** Accelerated urbanization drives the efficient utilization of urban underground space resources. Multi-core cables can transmit multi-channel electric energy through a single line, reducing the number of underground pipeline laying and adapting to the transformation needs of narrow spaces in urban core areas and old urban districts.

**Pull from medium and high-voltage distribution network upgrading:** The upgrading of existing distribution networks toward intelligence and high reliability has increased the application proportion of multi-core cables in power supply projects of load-intensive areas such as industrial parks and commercial complexes, replacing traditional overhead lines and scattered single-core cables.

**Appeal for construction efficiency and cost control:** Compared with parallel laying of multiple single-core cables, multi-core cables can complete the laying of multi-channel transmission lines at one time, greatly shortening the construction period and reducing the comprehensive costs of earth excavation and later operation and maintenance.

**Policy guidance for distribution network underground development:** Countries around the world have issued policies on the conversion of urban power grid overhead lines to underground, clarifying the underground proportion targets for distribution network construction, which directly drives the batch application of multi-core HV underground cables in urban network transformation.

#### Key Market Challenges

**Restrictions from technical and process bottlenecks:** The multi-core structure is prone to problems such as uneven electric field distribution and inter-phase thermal interference, imposing stringent requirements on insulation layer uniformity and shielding layer design. Controlling partial discharge of multi-core cables with high voltage grades

(220kV and above) is highly challenging, resulting in high mass production technical thresholds.

Raw material cost fluctuation risks: Copper and aluminum conductors account for a large proportion of total production costs, and their price fluctuations directly affect corporate profit margins. High-end insulation materials and armoring materials rely on imports to a certain extent, and supply chain stability is affected by geopolitical factors and market supply-demand changes.

Poor adaptability in laying and operation & maintenance: Multi-core cables are heavy and have weak flexibility, making them difficult to lay in complex terrains such as mountainous areas and urban dense pipeline networks. Later fault detection requires locating the fault points of specific cores, which puts forward high professional requirements for testing equipment and technical teams.

Profit margin compression due to homogeneous competition: The medium and low-voltage multi-core cable market has low technical thresholds, with numerous participants and fierce price wars. The high-voltage grade market is monopolized by international leaders and a few domestic enterprises, making it difficult for new entrants to break through technical and certification barriers.

This report studies the global Multi-core 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 Multi-core 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 Multi-core Land High Voltage Underground Cable that contribute to its increasing demand across many markets.

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

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

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

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

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

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

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

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

Global Multi-core 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 Multi-core 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 Multi-core 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 (US\$/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 Multi-core Land High Voltage Underground Cable Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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

HV

EHV

Global Multi-core Land High Voltage Underground Cable Market, Segmentation by Insulating Materials:

XLPE Insulated Cables

Oil-filled Insulated Cables

Others

Global Multi-core Land High Voltage Underground Cable Market, Segmentation by Functional Characteristics:

Conventional Cables

Smart Cables

Others

Global Multi-core 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

### **Key Questions Answered:**

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

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Multi-core Land High Voltage Underground Cable Introduction
- 1.2 World Multi-core Land High Voltage Underground Cable Supply & Forecast
  - 1.2.1 World Multi-core Land High Voltage Underground Cable Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Multi-core Land High Voltage Underground Cable Production (2021-2032)
  - 1.2.3 World Multi-core Land High Voltage Underground Cable Pricing Trends (2021-2032)
- 1.3 World Multi-core Land High Voltage Underground Cable Production by Region (Based on Production Site)
  - 1.3.1 World Multi-core Land High Voltage Underground Cable Production Value by Region (2021-2032)
  - 1.3.2 World Multi-core Land High Voltage Underground Cable Production by Region (2021-2032)
  - 1.3.3 World Multi-core Land High Voltage Underground Cable Average Price by Region (2021-2032)
  - 1.3.4 North America Multi-core Land High Voltage Underground Cable Production (2021-2032)
  - 1.3.5 Europe Multi-core Land High Voltage Underground Cable Production (2021-2032)
  - 1.3.6 China Multi-core Land High Voltage Underground Cable Production (2021-2032)
  - 1.3.7 Japan Multi-core Land High Voltage Underground Cable Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Multi-core Land High Voltage Underground Cable Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Multi-core Land High Voltage Underground Cable Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Multi-core Land High Voltage Underground Cable Demand (2021-2032)
- 2.2 World Multi-core Land High Voltage Underground Cable Consumption by Region
  - 2.2.1 World Multi-core Land High Voltage Underground Cable Consumption by Region (2021-2026)
  - 2.2.2 World Multi-core Land High Voltage Underground Cable Consumption Forecast by Region (2027-2032)
- 2.3 United States Multi-core Land High Voltage Underground Cable Consumption

(2021-2032)

2.4 China Multi-core Land High Voltage Underground Cable Consumption (2021-2032)

2.5 Europe Multi-core Land High Voltage Underground Cable Consumption (2021-2032)

2.6 Japan Multi-core Land High Voltage Underground Cable Consumption (2021-2032)

2.7 South Korea Multi-core Land High Voltage Underground Cable Consumption  
(2021-2032)

2.8 ASEAN Multi-core Land High Voltage Underground Cable Consumption  
(2021-2032)

2.9 India Multi-core Land High Voltage Underground Cable Consumption (2021-2032)

### **3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS**

3.1 World Multi-core Land High Voltage Underground Cable Production Value by  
Manufacturer (2021-2026)

3.2 World Multi-core Land High Voltage Underground Cable Production by  
Manufacturer (2021-2026)

3.3 World Multi-core Land High Voltage Underground Cable Average Price by  
Manufacturer (2021-2026)

3.4 Multi-core Land High Voltage Underground Cable Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Multi-core Land High Voltage Underground Cable Industry Rank of Major  
Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Multi-core Land High Voltage  
Underground Cable in 2025

3.5.3 Global Concentration Ratios (CR8) for Multi-core Land High Voltage  
Underground Cable in 2025

3.6 Multi-core Land High Voltage Underground Cable Market: Overall Company  
Footprint Analysis

3.6.1 Multi-core Land High Voltage Underground Cable Market: Region Footprint

3.6.2 Multi-core Land High Voltage Underground Cable Market: Company Product  
Type Footprint

3.6.3 Multi-core Land High Voltage Underground Cable Market: Company Product  
Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

## **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

4.1 United States VS China: Multi-core Land High Voltage Underground Cable Production Value Comparison

4.1.1 United States VS China: Multi-core Land High Voltage Underground Cable Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Multi-core Land High Voltage Underground Cable Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Multi-core Land High Voltage Underground Cable Production Comparison

4.2.1 United States VS China: Multi-core Land High Voltage Underground Cable Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Multi-core Land High Voltage Underground Cable Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Multi-core Land High Voltage Underground Cable Consumption Comparison

4.3.1 United States VS China: Multi-core Land High Voltage Underground Cable Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Multi-core Land High Voltage Underground Cable Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Multi-core Land High Voltage Underground Cable Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Multi-core Land High Voltage Underground Cable Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Multi-core Land High Voltage Underground Cable Production Value (2021-2026)

4.4.3 United States Based Manufacturers Multi-core Land High Voltage Underground Cable Production (2021-2026)

4.5 China Based Multi-core Land High Voltage Underground Cable Manufacturers and Market Share

4.5.1 China Based Multi-core Land High Voltage Underground Cable Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Multi-core Land High Voltage Underground Cable Production Value (2021-2026)

4.5.3 China Based Manufacturers Multi-core Land High Voltage Underground Cable Production (2021-2026)

4.6 Rest of World Based Multi-core Land High Voltage Underground Cable Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Multi-core Land High Voltage Underground Cable Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Multi-core Land High Voltage Underground Cable Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Multi-core Land High Voltage Underground Cable Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World Multi-core Land High Voltage Underground Cable Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 HV

5.2.2 EHV

5.3 Market Segment by Type

5.3.1 World Multi-core Land High Voltage Underground Cable Production by Type (2021-2032)

5.3.2 World Multi-core Land High Voltage Underground Cable Production Value by Type (2021-2032)

5.3.3 World Multi-core Land High Voltage Underground Cable Average Price by Type (2021-2032)

## **6 MARKET ANALYSIS BY INSULATING MATERIALS**

6.1 World Multi-core Land High Voltage Underground Cable Market Size Overview by Insulating Materials: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Insulating Materials

6.2.1 XLPE Insulated Cables

6.2.2 Oil-filled Insulated Cables

6.2.3 Others

6.3 Market Segment by Insulating Materials

6.3.1 World Multi-core Land High Voltage Underground Cable Production by Insulating Materials (2021-2032)

6.3.2 World Multi-core Land High Voltage Underground Cable Production Value by Insulating Materials (2021-2032)

6.3.3 World Multi-core Land High Voltage Underground Cable Average Price by Insulating Materials (2021-2032)

## **7 MARKET ANALYSIS BY FUNCTIONAL CHARACTERISTICS**

7.1 World Multi-core Land High Voltage Underground Cable Market Size Overview by Functional Characteristics: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Functional Characteristics

7.2.1 Conventional Cables

7.2.2 Smart Cables

7.2.3 Others

7.3 Market Segment by Functional Characteristics

7.3.1 World Multi-core Land High Voltage Underground Cable Production by Functional Characteristics (2021-2032)

7.3.2 World Multi-core Land High Voltage Underground Cable Production Value by Functional Characteristics (2021-2032)

7.3.3 World Multi-core Land High Voltage Underground Cable Average Price by Functional Characteristics (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World Multi-core Land High Voltage Underground Cable Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Direct Current

8.2.2 Alternative Current

8.3 Market Segment by Application

8.3.1 World Multi-core Land High Voltage Underground Cable Production by Application (2021-2032)

8.3.2 World Multi-core Land High Voltage Underground Cable Production Value by Application (2021-2032)

8.3.3 World Multi-core Land High Voltage Underground Cable Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

9.1 Prysmian Group

9.1.1 Prysmian Group Details

9.1.2 Prysmian Group Major Business

9.1.3 Prysmian Group Multi-core Land High Voltage Underground Cable Product and Services

9.1.4 Prysmian Group Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.1.5 Prysmian Group Recent Developments/Updates
- 9.1.6 Prysmian Group Competitive Strengths & Weaknesses
- 9.2 Nexans
  - 9.2.1 Nexans Details
  - 9.2.2 Nexans Major Business
  - 9.2.3 Nexans Multi-core Land High Voltage Underground Cable Product and Services
  - 9.2.4 Nexans Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.2.5 Nexans Recent Developments/Updates
  - 9.2.6 Nexans Competitive Strengths & Weaknesses
- 9.3 Southwire
  - 9.3.1 Southwire Details
  - 9.3.2 Southwire Major Business
  - 9.3.3 Southwire Multi-core Land High Voltage Underground Cable Product and Services
  - 9.3.4 Southwire Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.3.5 Southwire Recent Developments/Updates
  - 9.3.6 Southwire Competitive Strengths & Weaknesses
- 9.4 Hengtong Group
  - 9.4.1 Hengtong Group Details
  - 9.4.2 Hengtong Group Major Business
  - 9.4.3 Hengtong Group Multi-core Land High Voltage Underground Cable Product and Services
  - 9.4.4 Hengtong Group Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.4.5 Hengtong Group Recent Developments/Updates
  - 9.4.6 Hengtong Group Competitive Strengths & Weaknesses
- 9.5 Furukawa Electric
  - 9.5.1 Furukawa Electric Details
  - 9.5.2 Furukawa Electric Major Business
  - 9.5.3 Furukawa Electric Multi-core Land High Voltage Underground Cable Product and Services
  - 9.5.4 Furukawa Electric Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.5.5 Furukawa Electric Recent Developments/Updates
  - 9.5.6 Furukawa Electric Competitive Strengths & Weaknesses
- 9.6 Sumitomo Electric Industries
  - 9.6.1 Sumitomo Electric Industries Details

- 9.6.2 Sumitomo Electric Industries Major Business
- 9.6.3 Sumitomo Electric Industries Multi-core Land High Voltage Underground Cable Product and Services
- 9.6.4 Sumitomo Electric Industries Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 Sumitomo Electric Industries Recent Developments/Updates
- 9.6.6 Sumitomo Electric Industries Competitive Strengths & Weaknesses
- 9.7 Qrunning Cable
  - 9.7.1 Qrunning Cable Details
  - 9.7.2 Qrunning Cable Major Business
  - 9.7.3 Qrunning Cable Multi-core Land High Voltage Underground Cable Product and Services
  - 9.7.4 Qrunning Cable Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.7.5 Qrunning Cable Recent Developments/Updates
  - 9.7.6 Qrunning Cable Competitive Strengths & Weaknesses
- 9.8 LS Cable & System
  - 9.8.1 LS Cable & System Details
  - 9.8.2 LS Cable & System Major Business
  - 9.8.3 LS Cable & System Multi-core Land High Voltage Underground Cable Product and Services
  - 9.8.4 LS Cable & System Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.8.5 LS Cable & System Recent Developments/Updates
  - 9.8.6 LS Cable & System Competitive Strengths & Weaknesses
- 9.9 Taihan Electric
  - 9.9.1 Taihan Electric Details
  - 9.9.2 Taihan Electric Major Business
  - 9.9.3 Taihan Electric Multi-core Land High Voltage Underground Cable Product and Services
  - 9.9.4 Taihan Electric Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.9.5 Taihan Electric Recent Developments/Updates
  - 9.9.6 Taihan Electric Competitive Strengths & Weaknesses
- 9.10 Riyadh Cable
  - 9.10.1 Riyadh Cable Details
  - 9.10.2 Riyadh Cable Major Business
  - 9.10.3 Riyadh Cable Multi-core Land High Voltage Underground Cable Product and Services

9.10.4 Riyadh Cable Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Riyadh Cable Recent Developments/Updates

9.10.6 Riyadh Cable Competitive Strengths & Weaknesses

9.11 NKT Cables

9.11.1 NKT Cables Details

9.11.2 NKT Cables Major Business

9.11.3 NKT Cables Multi-core Land High Voltage Underground Cable Product and Services

9.11.4 NKT Cables Multi-core Land High Voltage Underground Cable Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 NKT Cables Recent Developments/Updates

9.11.6 NKT Cables Competitive Strengths & Weaknesses

## **10 INDUSTRY CHAIN ANALYSIS**

10.1 Multi-core Land High Voltage Underground Cable Industry Chain

10.2 Multi-core Land High Voltage Underground Cable Upstream Analysis

10.2.1 Multi-core Land High Voltage Underground Cable Core Raw Materials

10.2.2 Main Manufacturers of Multi-core Land High Voltage Underground Cable Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Multi-core Land High Voltage Underground Cable Production Mode

10.6 Multi-core Land High Voltage Underground Cable Procurement Model

10.7 Multi-core Land High Voltage Underground Cable Industry Sales Model and Sales Channels

10.7.1 Multi-core Land High Voltage Underground Cable Sales Model

10.7.2 Multi-core Land High Voltage Underground Cable Typical Distributors

## **11 RESEARCH FINDINGS AND CONCLUSION**

## **12 APPENDIX**

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

- Table 1. World Multi-core Land High Voltage Underground Cable Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Multi-core Land High Voltage Underground Cable Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Multi-core Land High Voltage Underground Cable Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Multi-core Land High Voltage Underground Cable Production Value Market Share by Region (2021-2026)
- Table 5. World Multi-core Land High Voltage Underground Cable Production Value Market Share by Region (2027-2032)
- Table 6. World Multi-core Land High Voltage Underground Cable Production by Region (2021-2026) & (K Meter)
- Table 7. World Multi-core Land High Voltage Underground Cable Production by Region (2027-2032) & (K Meter)
- Table 8. World Multi-core Land High Voltage Underground Cable Production Market Share by Region (2021-2026)
- Table 9. World Multi-core Land High Voltage Underground Cable Production Market Share by Region (2027-2032)
- Table 10. World Multi-core Land High Voltage Underground Cable Average Price by Region (2021-2026) & (US\$/Meter)
- Table 11. World Multi-core Land High Voltage Underground Cable Average Price by Region (2027-2032) & (US\$/Meter)
- Table 12. Multi-core Land High Voltage Underground Cable Major Market Trends
- Table 13. World Multi-core Land High Voltage Underground Cable Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Meter)
- Table 14. World Multi-core Land High Voltage Underground Cable Consumption by Region (2021-2026) & (K Meter)
- Table 15. World Multi-core Land High Voltage Underground Cable Consumption Forecast by Region (2027-2032) & (K Meter)
- Table 16. World Multi-core Land High Voltage Underground Cable Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Multi-core Land High Voltage Underground Cable Producers in 2025
- Table 18. World Multi-core Land High Voltage Underground Cable Production by Manufacturer (2021-2026) & (K Meter)

Table 19. Production Market Share of Key Multi-core Land High Voltage Underground Cable Producers in 2025

Table 20. World Multi-core Land High Voltage Underground Cable Average Price by Manufacturer (2021-2026) & (US\$/Meter)

Table 21. Global Multi-core Land High Voltage Underground Cable Company Evaluation Quadrant

Table 22. World Multi-core Land High Voltage Underground Cable Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Multi-core Land High Voltage Underground Cable Production Site of Key Manufacturer

Table 24. Multi-core Land High Voltage Underground Cable Market: Company Product Type Footprint

Table 25. Multi-core Land High Voltage Underground Cable Market: Company Product Application Footprint

Table 26. Multi-core Land High Voltage Underground Cable Competitive Factors

Table 27. Multi-core Land High Voltage Underground Cable New Entrant and Capacity Expansion Plans

Table 28. Multi-core Land High Voltage Underground Cable Mergers & Acquisitions Activity

Table 29. United States VS China Multi-core Land High Voltage Underground Cable Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Multi-core Land High Voltage Underground Cable Production Comparison, (2021 & 2025 & 2032) & (K Meter)

Table 31. United States VS China Multi-core Land High Voltage Underground Cable Consumption Comparison, (2021 & 2025 & 2032) & (K Meter)

Table 32. United States Based Multi-core Land High Voltage Underground Cable Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Multi-core Land High Voltage Underground Cable Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Multi-core Land High Voltage Underground Cable Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Multi-core Land High Voltage Underground Cable Production (2021-2026) & (K Meter)

Table 36. United States Based Manufacturers Multi-core Land High Voltage Underground Cable Production Market Share (2021-2026)

Table 37. China Based Multi-core Land High Voltage Underground Cable Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Multi-core Land High Voltage Underground Cable Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Multi-core Land High Voltage Underground Cable Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Multi-core Land High Voltage Underground Cable Production, (2021-2026) & (K Meter)

Table 41. China Based Manufacturers Multi-core Land High Voltage Underground Cable Production Market Share (2021-2026)

Table 42. Rest of World Based Multi-core Land High Voltage Underground Cable Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Multi-core Land High Voltage Underground Cable Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Multi-core Land High Voltage Underground Cable Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Multi-core Land High Voltage Underground Cable Production, (2021-2026) & (K Meter)

Table 46. Rest of World Based Manufacturers Multi-core Land High Voltage Underground Cable Production Market Share (2021-2026)

Table 47. World Multi-core Land High Voltage Underground Cable Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Multi-core Land High Voltage Underground Cable Production by Type (2021-2026) & (K Meter)

Table 49. World Multi-core Land High Voltage Underground Cable Production by Type (2027-2032) & (K Meter)

Table 50. World Multi-core Land High Voltage Underground Cable Production Value by Type (2021-2026) & (USD Million)

Table 51. World Multi-core Land High Voltage Underground Cable Production Value by Type (2027-2032) & (USD Million)

Table 52. World Multi-core Land High Voltage Underground Cable Average Price by Type (2021-2026) & (US\$/Meter)

Table 53. World Multi-core Land High Voltage Underground Cable Average Price by Type (2027-2032) & (US\$/Meter)

Table 54. World Multi-core Land High Voltage Underground Cable Production Value by Insulating Materials, (USD Million), 2021 & 2025 & 2032

Table 55. World Multi-core Land High Voltage Underground Cable Production by Insulating Materials (2021-2026) & (K Meter)

Table 56. World Multi-core Land High Voltage Underground Cable Production by Insulating Materials (2027-2032) & (K Meter)

Table 57. World Multi-core Land High Voltage Underground Cable Production Value by Insulating Materials (2021-2026) & (USD Million)

Table 58. World Multi-core Land High Voltage Underground Cable Production Value by

Insulating Materials (2027-2032) & (USD Million)

Table 59. World Multi-core Land High Voltage Underground Cable Average Price by Insulating Materials (2021-2026) & (US\$/Meter)

Table 60. World Multi-core Land High Voltage Underground Cable Average Price by Insulating Materials (2027-2032) & (US\$/Meter)

Table 61. World Multi-core Land High Voltage Underground Cable Production Value by Functional Characteristics, (USD Million), 2021 & 2025 & 2032

Table 62. World Multi-core Land High Voltage Underground Cable Production by Functional Characteristics (2021-2026) & (K Meter)

Table 63. World Multi-core Land High Voltage Underground Cable Production by Functional Characteristics (2027-2032) & (K Meter)

Table 64. World Multi-core Land High Voltage Underground Cable Production Value by Functional Characteristics (2021-2026) & (USD Million)

Table 65. World Multi-core Land High Voltage Underground Cable Production Value by Functional Characteristics (2027-2032) & (USD Million)

Table 66. World Multi-core Land High Voltage Underground Cable Average Price by Functional Characteristics (2021-2026) & (US\$/Meter)

Table 67. World Multi-core Land High Voltage Underground Cable Average Price by Functional Characteristics (2027-2032) & (US\$/Meter)

Table 68. World Multi-core Land High Voltage Underground Cable Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Multi-core Land High Voltage Underground Cable Production by Application (2021-2026) & (K Meter)

Table 70. World Multi-core Land High Voltage Underground Cable Production by Application (2027-2032) & (K Meter)

Table 71. World Multi-core Land High Voltage Underground Cable Production Value by Application (2021-2026) & (USD Million)

Table 72. World Multi-core Land High Voltage Underground Cable Production Value by Application (2027-2032) & (USD Million)

Table 73. World Multi-core Land High Voltage Underground Cable Average Price by Application (2021-2026) & (US\$/Meter)

Table 74. World Multi-core Land High Voltage Underground Cable Average Price by Application (2027-2032) & (US\$/Meter)

Table 75. Prysmian Group Basic Information, Manufacturing Base and Competitors

Table 76. Prysmian Group Major Business

Table 77. Prysmian Group Multi-core Land High Voltage Underground Cable Product and Services

Table 78. Prysmian Group Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market

Share (2021-2026)

Table 79. Prysmian Group Recent Developments/Updates

Table 80. Prysmian Group Competitive Strengths & Weaknesses

Table 81. Nexans Basic Information, Manufacturing Base and Competitors

Table 82. Nexans Major Business

Table 83. Nexans Multi-core Land High Voltage Underground Cable Product and Services

Table 84. Nexans Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Nexans Recent Developments/Updates

Table 86. Nexans Competitive Strengths & Weaknesses

Table 87. Southwire Basic Information, Manufacturing Base and Competitors

Table 88. Southwire Major Business

Table 89. Southwire Multi-core Land High Voltage Underground Cable Product and Services

Table 90. Southwire Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Southwire Recent Developments/Updates

Table 92. Southwire Competitive Strengths & Weaknesses

Table 93. Hengtong Group Basic Information, Manufacturing Base and Competitors

Table 94. Hengtong Group Major Business

Table 95. Hengtong Group Multi-core Land High Voltage Underground Cable Product and Services

Table 96. Hengtong Group Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Hengtong Group Recent Developments/Updates

Table 98. Hengtong Group Competitive Strengths & Weaknesses

Table 99. Furukawa Electric Basic Information, Manufacturing Base and Competitors

Table 100. Furukawa Electric Major Business

Table 101. Furukawa Electric Multi-core Land High Voltage Underground Cable Product and Services

Table 102. Furukawa Electric Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Furukawa Electric Recent Developments/Updates

Table 104. Furukawa Electric Competitive Strengths & Weaknesses

Table 105. Sumitomo Electric Industries Basic Information, Manufacturing Base and Competitors

Table 106. Sumitomo Electric Industries Major Business

Table 107. Sumitomo Electric Industries Multi-core Land High Voltage Underground Cable Product and Services

Table 108. Sumitomo Electric Industries Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Sumitomo Electric Industries Recent Developments/Updates

Table 110. Sumitomo Electric Industries Competitive Strengths & Weaknesses

Table 111. Qrunning Cable Basic Information, Manufacturing Base and Competitors

Table 112. Qrunning Cable Major Business

Table 113. Qrunning Cable Multi-core Land High Voltage Underground Cable Product and Services

Table 114. Qrunning Cable Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Qrunning Cable Recent Developments/Updates

Table 116. Qrunning Cable Competitive Strengths & Weaknesses

Table 117. LS Cable & System Basic Information, Manufacturing Base and Competitors

Table 118. LS Cable & System Major Business

Table 119. LS Cable & System Multi-core Land High Voltage Underground Cable Product and Services

Table 120. LS Cable & System Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. LS Cable & System Recent Developments/Updates

Table 122. LS Cable & System Competitive Strengths & Weaknesses

Table 123. Taihan Electric Basic Information, Manufacturing Base and Competitors

Table 124. Taihan Electric Major Business

Table 125. Taihan Electric Multi-core Land High Voltage Underground Cable Product and Services

Table 126. Taihan Electric Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Taihan Electric Recent Developments/Updates

Table 128. Taihan Electric Competitive Strengths & Weaknesses

Table 129. Riyadh Cable Basic Information, Manufacturing Base and Competitors

Table 130. Riyadh Cable Major Business

Table 131. Riyadh Cable Multi-core Land High Voltage Underground Cable Product and Services

Table 132. Riyadh Cable Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Riyadh Cable Recent Developments/Updates

Table 134. Riyadh Cable Competitive Strengths & Weaknesses

Table 135. NKT Cables Basic Information, Manufacturing Base and Competitors

Table 136. NKT Cables Major Business

Table 137. NKT Cables Multi-core Land High Voltage Underground Cable Product and Services

Table 138. NKT Cables Multi-core Land High Voltage Underground Cable Production (K Meter), Price (US\$/Meter), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. NKT Cables Recent Developments/Updates

Table 140. NKT Cables Competitive Strengths & Weaknesses

Table 141. Global Key Players of Multi-core Land High Voltage Underground Cable Upstream (Raw Materials)

Table 142. Global Multi-core Land High Voltage Underground Cable Typical Customers

Table 143. Multi-core Land High Voltage Underground Cable Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Multi-core Land High Voltage Underground Cable Picture

Figure 2. World Multi-core Land High Voltage Underground Cable Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Multi-core Land High Voltage Underground Cable Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Multi-core Land High Voltage Underground Cable Production (2021-2032) & (K Meter)

Figure 5. World Multi-core Land High Voltage Underground Cable Average Price (2021-2032) & (US\$/Meter)

Figure 6. World Multi-core Land High Voltage Underground Cable Production Value Market Share by Region (2021-2032)

Figure 7. World Multi-core Land High Voltage Underground Cable Production Market Share by Region (2021-2032)

Figure 8. North America Multi-core Land High Voltage Underground Cable Production (2021-2032) & (K Meter)

Figure 9. Europe Multi-core Land High Voltage Underground Cable Production (2021-2032) & (K Meter)

Figure 10. China Multi-core Land High Voltage Underground Cable Production (2021-2032) & (K Meter)

Figure 11. Japan Multi-core Land High Voltage Underground Cable Production (2021-2032) & (K Meter)

Figure 12. Multi-core Land High Voltage Underground Cable Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Multi-core Land High Voltage Underground Cable Consumption (2021-2032) & (K Meter)

Figure 15. World Multi-core Land High Voltage Underground Cable Consumption Market Share by Region (2021-2032)

Figure 16. United States Multi-core Land High Voltage Underground Cable Consumption (2021-2032) & (K Meter)

Figure 17. China Multi-core Land High Voltage Underground Cable Consumption (2021-2032) & (K Meter)

Figure 18. Europe Multi-core Land High Voltage Underground Cable Consumption (2021-2032) & (K Meter)

Figure 19. Japan Multi-core Land High Voltage Underground Cable Consumption (2021-2032) & (K Meter)

Figure 20. South Korea Multi-core Land High Voltage Underground Cable Consumption (2021-2032) & (K Meter)

Figure 21. ASEAN Multi-core Land High Voltage Underground Cable Consumption (2021-2032) & (K Meter)

Figure 22. India Multi-core Land High Voltage Underground Cable Consumption (2021-2032) & (K Meter)

Figure 23. Producer Shipments of Multi-core Land High Voltage Underground Cable by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Multi-core Land High Voltage Underground Cable Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Multi-core Land High Voltage Underground Cable Markets in 2025

Figure 26. United States VS China: Multi-core Land High Voltage Underground Cable Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Multi-core Land High Voltage Underground Cable Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Multi-core Land High Voltage Underground Cable Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Multi-core Land High Voltage Underground Cable Production Market Share 2025

Figure 30. China Based Manufacturers Multi-core Land High Voltage Underground Cable Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Multi-core Land High Voltage Underground Cable Production Market Share 2025

Figure 32. World Multi-core Land High Voltage Underground Cable Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Multi-core Land High Voltage Underground Cable Production Value Market Share by Type in 2025

Figure 34. HV

Figure 35. EHV

Figure 36. World Multi-core Land High Voltage Underground Cable Production Market Share by Type (2021-2032)

Figure 37. World Multi-core Land High Voltage Underground Cable Production Value Market Share by Type (2021-2032)

Figure 38. World Multi-core Land High Voltage Underground Cable Average Price by Type (2021-2032) & (US\$/Meter)

Figure 39. World Multi-core Land High Voltage Underground Cable Production Value by Insulating Materials, (USD Million), 2021 & 2025 & 2032

Figure 40. World Multi-core Land High Voltage Underground Cable Production Value

Market Share by Insulating Materials in 2025

Figure 41. XLPE Insulated Cables

Figure 42. Oil-filled Insulated Cables

Figure 43. Others

Figure 44. World Multi-core Land High Voltage Underground Cable Production Market Share by Insulating Materials (2021-2032)

Figure 45. World Multi-core Land High Voltage Underground Cable Production Value Market Share by Insulating Materials (2021-2032)

Figure 46. World Multi-core Land High Voltage Underground Cable Average Price by Insulating Materials (2021-2032) & (US\$/Meter)

Figure 47. World Multi-core Land High Voltage Underground Cable Production Value by Functional Characteristics, (USD Million), 2021 & 2025 & 2032

Figure 48. World Multi-core Land High Voltage Underground Cable Production Value Market Share by Functional Characteristics in 2025

Figure 49. Conventional Cables

Figure 50. Smart Cables

Figure 51. Others

Figure 52. World Multi-core Land High Voltage Underground Cable Production Market Share by Functional Characteristics (2021-2032)

Figure 53. World Multi-core Land High Voltage Underground Cable Production Value Market Share by Functional Characteristics (2021-2032)

Figure 54. World Multi-core Land High Voltage Underground Cable Average Price by Functional Characteristics (2021-2032) & (US\$/Meter)

Figure 55. World Multi-core Land High Voltage Underground Cable Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World Multi-core Land High Voltage Underground Cable Production Value Market Share by Application in 2025

Figure 57. Direct Current

Figure 58. Alternative Current

Figure 59. World Multi-core Land High Voltage Underground Cable Production Market Share by Application (2021-2032)

Figure 60. World Multi-core Land High Voltage Underground Cable Production Value Market Share by Application (2021-2032)

Figure 61. World Multi-core Land High Voltage Underground Cable Average Price by Application (2021-2032) & (US\$/Meter)

Figure 62. Multi-core Land High Voltage Underground Cable Industry Chain

Figure 63. Multi-core Land High Voltage Underground Cable Procurement Model

Figure 64. Multi-core Land High Voltage Underground Cable Sales Model

Figure 65. Multi-core Land High Voltage Underground Cable Sales Channels, Direct

Sales, and Distribution

Figure 66. Methodology

Figure 67. Research Process and Data Source

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