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Global Offshore Wind Farm Array Cables Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Offshore Wind Farm Array Cables market size is expected to reach $ 2215 million by 2032, rising at a market growth of 14.9% CAGR during the forecast period (2026-2032).

Offshore Wind Farm Array Cables are subsea power cables installed within the internal electrical collection network of an offshore wind farm to interconnect wind turbine generators and connect them to an offshore substation, offshore converter station or other offshore collection point, thereby collecting the electricity generated by individual turbines and transmitting it to the centralized power export facilities of the wind farm. These cables typically incorporate copper or aluminium conductors, insulation systems, semiconductive screens, longitudinal and radial water-blocking structures, metallic screens or sheaths, load-bearing armour and protective outer sheaths, and may also integrate optical-fibre elements for communication, control and condition monitoring, together with associated terminations, joints and connection accessories. Depending on the foundation type and operating conditions, they may use static designs laid on or buried beneath the seabed or dynamic designs engineered to withstand repeated bending, tensile forces and fatigue loads caused by floating-foundation movements, waves and currents. The product scope is limited to power collection and transmission within the offshore wind farm and excludes export cables that transmit aggregated power from the wind farm to an onshore grid connection point.

Key Findings

Global offshore wind additions exceeded 9 GW in 2025, supporting sustained demand for inter-array cable systems

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Static inter-array cables remain the largest product segment as fixed-bottom projects dominate commercial offshore wind deployment

66 kV systems are the mainstream commercial voltage, while 132 kV cables are moving through qualification and early adoption

Fixed-bottom offshore wind farms represent the largest application, while floating wind drives dynamic cable and accessory innovation

The market combines global cable groups, specialist subsea manufacturers and rapidly expanding Asian suppliers

Market Trends

Offshore Wind Farm Array Cables are progressing from conventional 33 kV collection networks toward 66 kV systems and, over the longer term, 132 kV architectures designed for larger turbines and higher-capacity array circuits. Higher voltage enables more generating capacity to be connected to each circuit and can reduce the number of cable runs, terminations and offshore installation operations. The 66 kV category has established a broad commercial project base, while 132 kV static products are entering qualification and manufacturing readiness and dynamic versions remain a major development priority for commercial-scale floating wind. Product design is also moving toward larger copper or aluminium conductors, wet and semi-dry insulation systems, lighter cable structures, integrated optical fibres and improved joints, connectors and termination interfaces. Aluminium conductors are receiving greater attention because they reduce material cost and cable weight, particularly for long fixed-bottom array routes, while copper remains important where compact dimensions, electrical performance or dynamic behaviour are prioritized. Floating wind is accelerating development of fatigue-resistant armour systems, buoyancy-supported cable configurations, bend stiffeners, dynamic-to-static joints and coupled cable-and-mooring engineering. At the same time, developers are placing greater emphasis on condition monitoring, distributed fibre-optic sensing, cable protection system qualification and lifecycle maintenance. Suppliers are therefore expanding from cable manufacturing toward engineered cable systems, project management, installation support and long-term inspection and repair services.

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Market Dynamics

Drivers

Growth is driven primarily by the expanding global offshore wind construction pipeline, increasing turbine ratings and the transition toward larger wind farms located farther from shore. More than 50 GW of offshore wind capacity was under construction globally in 2026, while the project pipeline for the following decade exceeded 300 GW, creating sustained demand for internal collection networks. Larger turbines increase power carried by each array string and support migration from 33 kV to 66 kV and eventually 132 kV systems. Fixed-bottom projects continue to generate the majority of cable volume, while the development of deeper-water resources in Europe, China, Japan, South Korea and other markets is expanding demand for dynamic inter-array cable systems. Local-content policies and government support for offshore wind manufacturing are also encouraging investment in new cable plants, testing facilities and installation assets.

Restraints

The market is constrained by the capital-intensive nature of submarine cable manufacturing, long product qualification cycles and the project-specific engineering required for each wind farm. Cable dimensions, conductor selection, armour design, burial requirements and accessories must be adapted to turbine capacity, route length, seabed conditions, foundation type and installation method. New factories require large vertical or continuous vulcanization lines, heavy-duty carousels, quayside loading infrastructure and extensive electrical and mechanical testing capabilities, limiting the number of qualified suppliers. Offshore wind project delays caused by financing costs, permitting, grid connection constraints and renegotiation of power purchase or auction terms can shift cable production schedules and reduce factory utilization. Developers are also cautious about adopting new 132 kV and dynamic cable technologies before testing standards, interfaces and long-term operating records are sufficiently established.

Opportunities

The strongest opportunities are emerging in 66 kV replacement and expansion demand, 132 kV array systems, floating offshore wind and regional supply-chain localization. Asia-Pacific is expected to contribute about two-thirds of additional offshore wind

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capacity through 2030, led by China and followed by expanding project pipelines in South Korea, Taiwan, Japan and emerging Southeast Asian markets. European opportunities remain substantial as the United Kingdom, Germany, the Netherlands, Poland and other markets develop larger fixed-bottom projects and prepare floating wind leasing areas. Dynamic cables, dynamic-to-static joints, bend-control products, monitoring systems and cable repair services will gain importance as floating projects move from demonstration scale toward multi-turbine commercial arrays. Suppliers can also expand revenue through cable engineering, accessories, factory pre-termination, installation support, condition monitoring and lifecycle service contracts. Government incentives for domestic cable production create additional entry opportunities for regional manufacturers, although successful participation will depend on qualification, project references and reliable delivery.

Challenges

Cable reliability remains one of the most important technical and commercial challenges in offshore wind. Manufacturing defects, handling damage, excessive installation tension, insufficient burial, seabed movement, cable protection system failure and joint or termination defects can lead to prolonged turbine outages and expensive offshore repairs. Dynamic inter-array cables face additional risks from repeated bending, tension, torsion, armour-wire movement and interaction with mooring systems, requiring detailed global analysis, local cross-sectional modelling and representative fatigue testing. The transition to 132 kV introduces further uncertainty around wet-ageing performance, accessory interfaces, testing procedures and the qualification of both static and dynamic systems. Supply-chain risks include volatility in copper, aluminium, polymers and armour steel, limited availability of specialist installation vessels and competition for manufacturing capacity from export cables and interconnector projects. Suppliers must therefore balance rapid capacity expansion with strict quality control, project execution discipline and long-term product reliability.

Industry Chain Analysis

The upstream industry consists of copper and aluminium conductor materials, semiconductive compounds, XLPE and EPR insulation materials, water-blocking tapes and powders, lead or alternative metallic barrier materials, polyethylene outer-sheath compounds, galvanized or corrosion-resistant armour wire, optical fibres and stainless-steel fibre tubes. Cable accessory suppliers provide terminations, joints, connectors,

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hang-off assemblies, bend stiffeners, bend restrictors, buoyancy modules and cable protection systems. Midstream manufacturers undertake electrical and mechanical design, conductor stranding, insulation extrusion, screening, water blocking, cabling, fibre integration, armouring, sheathing, factory jointing, testing, storage and vessel loading. Dynamic products require additional fatigue analysis, full-scale bending and tension testing and integrated assessment with floating foundations and mooring systems. Downstream customers include offshore wind developers, turbine suppliers, offshore transmission owners, EPCI contractors and specialist cable installation companies. Value creation increasingly depends on complete system engineering rather than cable length alone, with higher-value activities concentrated in qualification, accessories, route-specific design, installation engineering, monitoring, repair preparedness and lifecycle services.

Segment Insights

By mechanical service condition, Static Inter-Array Cables account for the clear majority of present market demand because most operating and near-term offshore wind projects use fixed-bottom foundations. These cables are commonly installed as three-core armoured systems laid on or buried beneath the seabed and connected to turbines through J-tubes, I-tubes or cable protection systems. Dynamic Inter-Array Cables represent a smaller but more technically intensive segment serving floating wind farms. A floating array normally requires dynamic sections between the moving platform and seabed touchdown point, static seabed sections and dynamic-to-static joints, making the system value per connection materially higher than for conventional fixed-bottom projects. Dynamic products require enhanced fatigue resistance, lower bending stiffness and coordinated design with platform motions and mooring arrangements.

By voltage rating, the Up to 36 kV segment represents the installed base of early offshore wind farms and remains relevant for smaller projects and replacement demand. The Above 36 kV to 66 kV segment is the largest current commercial category, supported by widespread adoption of 66 kV systems in large fixed-bottom wind farms and growing use in floating projects. The Above 66 kV segment is led by 132 kV development and qualification programmes intended to support larger turbines, longer array strings and reduced circuit counts. Commercial penetration remains limited, but qualified static products and ongoing dynamic cable programmes indicate that this segment will become increasingly important as turbine capacity and project scale rise.

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Downstream Market Opportunities

Fixed-Bottom Offshore Wind Farms remain the primary downstream application and generate the largest demand for static 66 kV cable systems, accessories and installation support. Procurement is increasingly organized through multi-year framework agreements or complete array cable packages covering engineering, manufacturing, testing, accessories and offshore installation coordination. Floating Offshore Wind Farms form the principal emerging application and create demand for dynamic cables, seabed static sections, specialised joints, buoyancy systems and fatigue-management solutions. Early commercial opportunities are concentrated in Europe and Asia, where deep-water resources, limited nearshore sites and government leasing programmes are encouraging floating wind development. As projects move toward larger arrays and floating substations, developers will require higher-voltage dynamic systems and more integrated monitoring, maintenance and replacement strategies.

Regional Insights

Asia-Pacific is the largest offshore wind growth region and is expected to account for about two-thirds of additional global offshore wind capacity through 2030. China represents the largest volume market and has developed an extensive domestic supply base led by Hengtong Optic-Electric, Orient Cable and ZTT, with additional capacity emerging from companies such as Hanhe Cable and Far East Cable. Chinese competition is characterized by large-scale manufacturing, integrated marine engineering capabilities and lower project costs. South Korea is strengthening its position through LS Cable & System and Taihan Cable & Solution, while Taiwan remains an important project market for European and Korean suppliers. Japan has strong submarine cable technology through Sumitomo Electric and Furukawa Electric, although commercial inter-array activity remains less developed than in China, Europe and South Korea.

Europe remains the leading region for high-voltage array cable engineering, international project references and floating wind technology. The region supports major manufacturing bases operated by Prysmian, Nexans, JDR Cable Systems, NKT, Hellenic Cables and TKF, alongside established developers and installation contractors. Capacity additions at TKF, JDR and other suppliers reflect strong forward demand but also the need to address constrained manufacturing capacity. North America has a significant long-term offshore wind resource and selected domestic and imported cable

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supply projects, although permitting, financing and project restructuring have slowed near-term deployment. Emerging opportunities are also developing in Australia, Vietnam, the Philippines and other coastal markets, but local project execution, grid infrastructure and regulatory frameworks remain less mature.

Competitive Landscape Analysis

The competitive landscape is concentrated among companies combining submarine cable engineering, high-voltage manufacturing, accessory qualification and offshore project execution. Prysmian and Nexans maintain broad global cable portfolios, installation assets and extensive offshore wind references. JDR Cable Systems, part of TFKable Group, is a specialist supplier with strong static and dynamic array cable capabilities and qualified 132 kV technology. Hellenic Cables, the cable segment of Cenergy Holdings, and TKF, part of TKH Group, have established significant positions in the European 66 kV market through large project awards and dedicated manufacturing capacity. NKT retains relevant inter-array project experience while maintaining a broader strategic focus on high-voltage offshore transmission. In Asia, LS Cable & System, Taihan Cable & Solution, Hengtong Optic-Electric, Orient Cable and ZTT combine manufacturing scale with growing engineering and installation capabilities. Sumitomo Electric and Furukawa Electric contribute relevant subsea and dynamic cable technologies, particularly for Japan’s future floating wind market, while Hanhe Cable and Far East Cable form part of the expanding Chinese regional supplier pool. Competition is increasingly determined by qualified production capacity, ability to supply complete cable and accessory packages, project delivery reliability, dynamic cable expertise, installation resources and long-term service support rather than cable price alone.

Report Scope

This report studies the global Offshore Wind Farm Array Cables production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Offshore Wind Farm Array Cables 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 Offshore Wind Farm Array Cables that contribute to its increasing demand across many markets.

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Highlights and key features of the study

Global Offshore Wind Farm Array Cables total production and demand, 2021-2032, (K Meter)

Global Offshore Wind Farm Array Cables total production value, 2021-2032, (USD Million)

Global Offshore Wind Farm Array Cables production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Meter), (based on production site)

Global Offshore Wind Farm Array Cables consumption by region & country, CAGR, 2021-2032 & (K Meter)

U.S. VS China: Offshore Wind Farm Array Cables domestic production, consumption, key domestic manufacturers and share

Global Offshore Wind Farm Array Cables production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Meter)

Global Offshore Wind Farm Array Cables production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Meter)

Global Offshore Wind Farm Array Cables production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Meter)

This report profiles key players in the global Offshore Wind Farm Array Cables 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, Nexans, JDR Cable Systems, NKT, Hellenic Cables, LS Cable & System, Sumitomo Electric, TKF, Taihan Cable & Solution, Hengtong Optic-Electric, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Offshore Wind Farm Array Cables 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 Offshore Wind Farm Array Cables Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Offshore Wind Farm Array Cables Market, Segmentation by Type:

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Static Inter-Array Cables

Dynamic Inter-Array Cables

Global Offshore Wind Farm Array Cables Market, Segmentation by Voltage Rating:

Up to 36 kV

Above 36 kV to 66 kV

Above 66 kV

Global Offshore Wind Farm Array Cables Market, Segmentation by Application:

Fixed-Bottom Offshore Wind Farms

Floating Offshore Wind Farms

Companies Profiled:

Prysmian

Nexans

JDR Cable Systems

NKT

Hellenic Cables

LS Cable & System

Sumitomo Electric

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TKF

Taihan Cable & Solution

Hengtong Optic-Electric

Orient Cable

ZTT

Key Questions Answered

1. How big is the global Offshore Wind Farm Array Cables market?
2. What is the demand of the global Offshore Wind Farm Array Cables market?
3. What is the year over year growth of the global Offshore Wind Farm Array Cables market?
4. What is the total value of the global Offshore Wind Farm Array Cables market?
5. Who are the Major Players in the global Offshore Wind Farm Array Cables market?
6. What are the growth factors driving the market demand?

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