

Global Insulation Materials for Submarine HVDC Cables Market Growth 2026-2032

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Abstracts

The global Insulation Materials for Submarine HVDC Cables market size is predicted to grow from US\$ 140 million in 2025 to US\$ 241 million in 2032; it is expected to grow at a CAGR of 8.1% from 2026 to 2032.

Insulation materials for submarine HVDC cables refer to high-reliability primary insulation materials used in submarine high-voltage direct-current power cable systems. They mainly include extruded DC-XLPE insulation compounds, mass-impregnated paper insulation, PPLP composite paper insulation and emerging PP-based thermoplastic insulation materials. Upstream inputs include high-purity PE/LDPE base resins, peroxide curing agents, antioxidants, DC stabilizers, insulating paper, PPLP tapes, impregnation compounds and clean packaging materials. Downstream applications include offshore wind export cables, cross-sea transmission, island interconnection, cross-border power interconnectors and long-distance high-capacity HVDC transmission. Compared with land AC cable insulation materials, submarine HVDC cable insulation requires stronger DC conductivity stability, space-charge control, long-term underwater reliability, thermal stability, electrical ageing resistance and polarity-reversal performance.

In 2025, global insulation materials for submarine HVDC cables production reached approximately 35 kilotons, with an average global market price is \$4,000 per ton.

From a global industry perspective, insulation materials for submarine HVDC cables have become critical base materials for offshore wind export, cross-sea interconnection, island power supply and long-distance bulk power transmission. Compared with AC submarine cables, HVDC submarine cables are better suited to long-distance, high-capacity and lower-loss transmission, but their insulation systems operate under DC

electric field, temperature gradients, polarity reversal, load cycling, seabed pressure and installation mechanical stress. This creates stricter requirements for dielectric stability, space-charge suppression, low electrical conductivity, electrical-tree resistance, thermal aging performance and interface cleanliness. Traditional submarine HVDC projects have long used mass-impregnated paper or mass-impregnated non-draining insulation systems, especially for long-distance and high-voltage routes. In recent years, DC-XLPE extruded insulation has gained wider use in VSC-HVDC and offshore wind grid-connection projects because of its solid insulation structure, manufacturing efficiency, environmental profile and system-integration advantages. CIGRE TB 852 extends testing recommendations for DC extruded cable systems up to 800kV, reflecting the move of extruded-insulation HVDC cable systems toward higher voltage levels.

In terms of industry trends, insulation materials for submarine HVDC cables are moving toward higher voltage ratings, lower space charge, lower DC conductivity, fewer defects, higher cleanliness, longer lifetime, improved environmental performance and recyclability. For DC-XLPE compounds, the key technical focus is suppressing space-charge accumulation, reducing temperature-dependent conductivity, controlling crosslinking by-products, minimizing gels and metallic contaminants, and improving degassing efficiency and long-term electro-thermal aging stability. For mass-impregnated paper and PPLP systems, development focuses on insulation uniformity, void resistance, load-cycle durability and deepwater installation reliability. As submarine cable voltage, transmission capacity and laying depth increase, insulation-material competition is shifting from breakdown strength alone toward a broader performance package covering conductivity, space charge, thermo-mechanical stability, partial-discharge control, manufacturing cleanliness, factory-joint compatibility and subsea installation reliability. Polypropylene-based thermoplastic insulation, recyclable polymer insulation and low-by-product insulation systems are also becoming important next-generation material directions for HVDC cables.

The main growth drivers come from three areas. First, offshore wind development, cross-sea interconnection, long-distance renewable power export and island-grid construction are increasing demand for highly reliable insulation materials for submarine HVDC cables. Second, insulation failure in a submarine cable can lead to long repair cycles, high offshore intervention costs and significant outage impacts, so project owners and cable manufacturers place strong emphasis on long-term reliability, prequalification testing, defect control and operating track records. Third, power grids are upgrading toward higher voltage, larger capacity, longer-distance and lower-carbon transmission, pushing insulation materials to develop along multiple routes, including

traditional mass-impregnated paper systems, high-performance DC-XLPE, PPLP composite insulation and recyclable thermoplastic insulation.

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

This Insight Report provides a comprehensive analysis of the global Insulation Materials for Submarine HVDC Cables landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Insulation Materials for Submarine HVDC Cables portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Insulation Materials for Submarine HVDC Cables market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Insulation Materials for Submarine HVDC Cables and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Insulation Materials for Submarine HVDC Cables.

This report presents a comprehensive overview, market shares, and growth opportunities of Insulation Materials for Submarine HVDC Cables market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Extruded DC-XLPE Insulation

Mass-Impregnated Paper Insulation

PPLP Composite Paper Insulation

Others

Segmentation by Voltage Class:

≥320 kV Cables

400-500 kV Cables

525 kV Cables

Others

Segmentation by Application:

Offshore Wind Export Cables

Cross-sea Transmission & Island Interconnection

Offshore Oil & Gas

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Borealis

Dow Inc.

Hanwha Solutions

Wanma Macromolecule Material Group

Key Questions Addressed in this Report

What is the 10-year outlook for the global Insulation Materials for Submarine HVDC Cables market?

What factors are driving Insulation Materials for Submarine HVDC Cables market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Insulation Materials for Submarine HVDC Cables market opportunities vary by end market size?

How does Insulation Materials for Submarine HVDC Cables break out by Type, by Application?

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