

High Voltage Cables and Accessories Market by Product Type (Cables (XLPE, EPR, HEPR, MI), Accessories (Joints, Termination, Fittings & Fixtures), Conductor Type (Aluminum, Copper), Installation, Voltage, End User & Region - Global Forecast to 2028

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Abstracts

The high voltage cables and accessories market is estimated to grow from USD 40.0 Billion in 2023 to USD 52.5 Billion by 2028; it is expected to record a CAGR of 5.6% during the forecast period. Increasing power generation capacity with growing power demand coupled with decreased transmission power loss drives the high voltage cables and accessories market.

“245kV: The second-fastest segment of the high voltage cables and accessories market, by voltage rating”

Based on end user, the high voltage cables and accessories market has been split into six types: 72.5kV, 123kV, 145kV, 170kV, 245kV, and 400kV and above. The adoption of 245kV cables is growing in the high voltage cables and accessories market due to their high power transmission ability with efficiency over long distances. These cables are used in power grids, substations, industrial applications and renewable energy projects. These cables prevent electrical leakages due to their exceptional insulation properties.

“Overhead segment is expected to emerge as the largest segment based on installation”

Based on installation, the high voltage cables and accessories market has been segmented into overhead, underground, and submarine. The overhead segment is expected to be the largest segment owing to its efficiency in distribution of power. It is

cost effective as compared to underground and submarine cables. Being used in different applications like power transmission and distribution, telecommunication, highways and transportation networks and much more, overhead cables has proved to be easily deployed and maintained.

“Renewables is expected to emerge as fastest segment based on end user”

By end user, the high voltage cables and accessories market has been segmented into power utilities, renewables, and industrials. Increasing investments in the renewables are anticipated to drive the demand for high voltage cables and accessories. The rising investment in renewable energy plants is driven by government policies, incentives and climate change concerns. Renewable energy projects align with sustainability goals and responsibility.

Europe is expected to be the second-largest region in the high voltage cables and accessories market

Europe is expected to be the second-largest region in the high voltage cables and accessories market between 2023–2028, preceded by Asia Pacific. The power transmission applications in the region due to the increasing demand for energy, which has prompted the expansion of the high voltage cables and accessories market. Moreover, countries in this region have been focusing on the infrastructure development and interconnection projects. Additionally, the governments of these countries have implemented regulations, policies and incentives to attract foreign investments in the power transmission sector. These are the key factors fostering the growth of the high voltage cables and accessories market in the Europe.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 45%, Tier 2- 30%, and Tier 3- 25%

By Designation: C-Level- 35%, Director Levels- 25%, and Others- 40%

By Region: Asia Pacific- 33%, North America- 27%, Europe- 20%, the Middle East & Africa- 12%, and South America- 8%

Note: Others include product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2021. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The high voltage cables and accessories market is dominated by a few major players that have a wide regional presence. The leading players in the high voltage cables and accessories market are Prysmian Group (Italy), Sumitomo Electric Industries Ltd. (Japan), Nexans (France), LS Cable & System Ltd. (Korea), and NKT A/S (Denmark).

Research Coverage:

The report defines, describes, and forecasts the high voltage cables and accessories market, by product type, conductor type, voltage rating, installation, end user, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates, in terms of value, and future trends in the high voltage cables and accessories market.

Key Benefits of Buying the Report

Increased investments in electricity grids, decrease in the power losses, and growing focus on environmental mandates drive the demand. Factors such as complicated regulatory process, and high prices installation and maintenance hinder market growth. Rise in the power generation scope couples with more adoption of HVDC submarine power cables offer lucrative opportunities in this market. Dynamic prices of raw materials and need of expertise in deployment and development are major challenges faced by countries in this market.

Product Development/ Innovation: The trends such as P-laser insulation, XLPE insulation, dry and self supporting DOC termination, have led to more efficient, reliable, durable, and high power transmission. The focus on underground cables has also led to the expectation that it would minimize the land usage and will contribute more safety and security.

Market Development: The global scenario of high voltage cables and accessories in power transmission applications is evolving rapidly, with trends towards underground and submarine cables from overhead cables to minimize environmental impact and enhance reliability. XLPE cables are used due to their exceptional electrical properties, including high insulation strength, low dielectric loss, and resistance to moisture.

Market Diversification: PFISTERER Holding AG introduced first dry and self supporting dry outdoor cable termination with voltage upto 170kV. This new launch saves installation time and has decreased it from hours to minutes. It is reliable and efficient.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Prysmian Group (Italy), Sumitomo Electric Industries Ltd. (Japan), Nexans (France), LS Cable & System Ltd. (Korea), and NKT A/S (Denmark) among others in the high voltage cables and accessories market.

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