

# **High Voltage Cable Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Installation (Overhead, Underground, Submarine), By Voltage (100 kV – 250 kV, 251 kV – 400 kV, Above 400 kV), By End-User (Industrial, Utility, Commercial), By Region, By Competition, 2018-2028**

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## **Abstracts**

Global High Voltage Cable Market was valued at USD 37.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 7.19% through 2028.

The High Voltage Cable market encompasses the production, distribution, and utilization of specialized electrical cables designed to transmit electricity at elevated voltage levels, typically exceeding 1,000 volts. These cables are essential components of the global electrical infrastructure, serving the critical function of efficiently and safely transporting high-voltage electrical power over long distances, both above and below ground.

High Voltage Cables are characterized by their ability to withstand the stresses associated with high voltage transmission, which includes the management of electrical insulation, conductor materials, and shielding. They find extensive applications in various sectors, including power generation, transmission, and distribution, as well as in industries such as renewable energy, utilities, transportation electrification, and data centers.

The market's dynamics are influenced by factors such as the electrification of transportation, the integration of renewable energy sources, the upgrading of aging

electrical grids, and government policies promoting energy efficiency and sustainability. High Voltage Cable manufacturers constantly strive to innovate, developing cables that meet evolving technical standards, environmental regulations, and safety requirements, making them an indispensable part of the global energy ecosystem.

## Key Market Drivers

### Renewable Energy Integration

The integration of renewable energy sources like wind, solar, and hydropower into the global energy landscape is a primary driver of the high voltage cable market. As countries strive to reduce greenhouse gas emissions and transition to cleaner energy alternatives, the demand for high voltage cables has skyrocketed.

High voltage cables are essential in connecting remote renewable energy generation sites to the electrical grid. They facilitate the efficient transmission of electricity over long distances, minimizing energy loss during transport. This is crucial because renewable energy installations are often located in remote areas, far from population centers.

Moreover, the intermittent nature of renewable energy sources necessitates robust transmission systems to balance supply and demand. High voltage cables play a pivotal role in this by enabling the transport of surplus energy from regions with abundant renewable resources to areas with higher energy demand.

Governments and utilities worldwide are investing heavily in renewable energy projects, which, in turn, drives the demand for high voltage cables. The growth of offshore wind farms and large-scale solar installations further underscores the importance of these cables in delivering clean energy to consumers.

### Urbanization and Infrastructure Development

The relentless pace of urbanization and infrastructure development across the globe is a significant driver of the high voltage cable market. As cities expand and modernize, their energy needs grow exponentially. High voltage cables are crucial components of the electrical transmission systems that power these urban centers.

In rapidly growing urban areas, there's often a need to transport electricity over long distances, including underground and underwater. High voltage cables excel in these

scenarios, efficiently transmitting electricity with minimal loss. They are vital for connecting power generation facilities, substations, and distribution networks to ensure a steady supply of electricity to homes, businesses, and industries.

The development of smart cities, with advanced infrastructure and digital technologies, also places greater demands on electrical systems. High voltage cables are key enablers of these smart grids, allowing for efficient energy distribution and the integration of renewable energy sources and energy storage systems.

Additionally, the construction of large-scale infrastructure projects such as airports, railways, and industrial zones requires robust power supply solutions. High voltage cables are essential in providing reliable electrical connections to these critical facilities, further fueling demand in the market.

### Electrification of Transportation

The ongoing electrification of transportation, including the widespread adoption of electric vehicles (EVs) and the development of charging infrastructure, is a pivotal driver of the high voltage cable market. As governments and consumers prioritize reducing greenhouse gas emissions and transitioning to cleaner transportation options, the demand for high voltage cables has surged.

High voltage cables play a central role in EV charging stations and electric vehicle powertrains. They enable the rapid and efficient transfer of electricity from the grid to EVs, reducing charging times and improving convenience for EV owners.

The expansion of public transportation systems, including electric buses and trains, also relies on high voltage cables to power these vehicles. As more cities and regions invest in electrified public transportation, the market for high voltage cables continues to grow.

Furthermore, the development of high-speed electric trains, such as maglev systems, requires specialized high voltage cables for propulsion and power distribution. These cutting-edge transportation technologies drive innovation and investment in the high voltage cable industry.

Overall, the electrification of transportation is a global trend with profound implications for the energy sector, and high voltage cables are at the forefront of enabling this transition. The market's growth is closely tied to the expansion of electric mobility solutions and charging infrastructure worldwide.

## Upgrading Aging Grids

The aging electrical grids in many countries are in dire need of modernization and upgrading to meet the growing energy demands of the 21st century. High voltage cables are pivotal in these grid enhancement efforts, making them a critical driver of the high voltage cable market.

Aging grids often suffer from inefficiencies, high transmission losses, and increased susceptibility to outages. High voltage cables address these challenges by providing a more reliable and efficient means of transmitting electricity over long distances.

Governments and utilities worldwide recognize the importance of grid modernization for energy security and resilience. They are investing in projects aimed at replacing or upgrading outdated infrastructure with advanced high voltage cable systems. These initiatives include the installation of underground and subsea cables to minimize environmental impact and enhance grid reliability.

Additionally, grid modernization involves the integration of advanced monitoring and control systems, which benefit from the capabilities of high voltage cables to transmit data and information alongside electricity. This convergence of power and data transmission further underscores the significance of high voltage cables in grid upgrades.

As the global demand for electricity continues to rise, driven by population growth and increased electrification of various sectors, the need for efficient and reliable high voltage cable systems will remain a driving force in the market.

## Data Centers and Cloud Computing

The explosive growth of data centers and cloud computing services has become a major driver of the high voltage cable market. These facilities require robust and uninterrupted power supplies to ensure the reliability of critical IT operations.

High voltage cables are essential for connecting data centers to the electrical grid, supplying the high levels of electricity needed to power servers, cooling systems, and other infrastructure. The uninterrupted operation of data centers is vital for businesses and organizations that rely on them to store and process vast amounts of digital information.

As the demand for cloud computing services continues to surge, major technology companies are constructing massive data centers around the world. These mega-data centers require extensive high voltage cable infrastructure to ensure a constant and uninterrupted power supply.

Additionally, the development of edge computing, which brings data processing closer to end-users, necessitates new data center facilities. High voltage cables are integral in connecting these distributed data centers to the grid and ensuring low-latency access to data.

The increasing importance of data security and data sovereignty regulations also drives the expansion of data center facilities in different regions. This, in turn, leads to a growing demand for high voltage cables.

Overall, as the digitalization of businesses and society accelerates, the high voltage cable market will remain closely tied to the growth and expansion of data centers and cloud computing infrastructure.

### International Energy Trade

The international trade of energy resources, including electricity, is a critical driver of the high voltage cable market. Cross-border energy trade and interconnections between neighboring countries are becoming increasingly important for energy security, resource optimization, and economic cooperation.

High voltage cables are integral to these interconnection projects, enabling the efficient and reliable transmission of electricity across borders. They facilitate the exchange of surplus energy between nations, allowing countries with excess generation capacity to export electricity to regions with higher demand.

Regional power grids and international energy agreements promote the development of cross-border transmission infrastructure. These initiatives aim to diversify energy sources, enhance grid reliability, and reduce dependency on a single energy supplier.

Offshore wind farms and interconnection projects that harness renewable energy resources in neighboring countries also rely on high voltage cables to transmit clean energy to consumers. The expansion of such projects is driving significant investments in the high voltage cable market.

Additionally, international energy trade promotes energy market integration, price stabilization, and overall energy system resilience. As countries seek to optimize their energy resources and reduce reliance on fossil fuels, high voltage cables play a central role

## Government Policies are Likely to Propel the Market

### Renewable Energy Promotion Policies

Governments worldwide are implementing policies to promote renewable energy sources, and these policies have a profound impact on the High Voltage Cable market. To combat climate change and reduce dependence on fossil fuels, governments are offering incentives such as tax credits, subsidies, and feed-in tariffs to encourage the development of renewable energy projects. These policies create a strong demand for High Voltage Cables as they are essential for transmitting electricity generated from sources like wind, solar, and hydropower.

In addition to financial incentives, governments are also setting renewable energy targets and mandating the integration of renewable energy into their energy mix. This drives the need for high-capacity High Voltage Cables to efficiently transport renewable electricity from remote generation sites to urban centers and industries. As a result, High Voltage Cable manufacturers must align their products with the specifications required by renewable energy projects, ensuring compliance with government regulations and fostering market growth.

Furthermore, environmental regulations and emissions reduction commitments have compelled governments to prioritize renewable energy sources. High Voltage Cables play a pivotal role in realizing these renewable energy goals, making them an integral part of government policies aimed at achieving a sustainable energy future.

### Grid Modernization and Infrastructure Enhancement

Governments across the globe are recognizing the need to upgrade and modernize their aging electrical grids. To address this, they are formulating policies and investing in grid infrastructure enhancements. High Voltage Cables are a fundamental component of these grid modernization efforts.

Policies aimed at grid modernization typically include allocating significant budgets for

the replacement or upgrading of existing transmission infrastructure. This involves the installation of new High Voltage Cable systems that are more efficient, reliable, and capable of accommodating increased energy loads. Governments also encourage the integration of smart grid technologies that enhance grid monitoring and control, all of which depend on advanced High Voltage Cable systems.

Moreover, environmental concerns and land-use restrictions are leading to the expansion of underground and subsea High Voltage Cable projects. Governments are establishing policies to promote the use of these underground and subsea cable systems, minimizing the visual and environmental impact of overhead transmission lines.

High Voltage Cable manufacturers must closely monitor and align their products with these government policies, ensuring they meet the technical specifications and environmental standards required for grid modernization projects. Compliance with such policies is vital for market access and growth.

### Energy Efficiency and Carbon Reduction Initiatives

Governments around the world are increasingly focused on energy efficiency and carbon reduction as part of their climate change mitigation efforts. To reduce greenhouse gas emissions, many countries are implementing energy efficiency policies and setting strict emission reduction targets.

High Voltage Cables play a significant role in achieving energy efficiency goals. Governments are enacting policies that encourage the use of high-efficiency cable systems that minimize energy losses during transmission. This promotes the adoption of advanced High Voltage Cables with superior insulation materials and lower resistance, enhancing overall grid efficiency.

Additionally, carbon reduction policies often involve the integration of more renewable energy sources into the grid, as mentioned earlier. High Voltage Cables are essential for connecting renewable energy projects to the grid, facilitating the efficient transmission of clean electricity. Governments may require utilities to procure a certain percentage of their electricity from renewable sources, further driving the demand for High Voltage Cables.

Manufacturers in the High Voltage Cable market must be mindful of these government policies and develop products that meet the efficiency and environmental standards

outlined in these regulations. Ensuring compliance allows companies to benefit from the growing emphasis on energy efficiency and carbon reduction in the energy sector.

### Electrification of Transportation

The electrification of transportation, including electric vehicles (EVs) and charging infrastructure, is a priority for many governments aiming to reduce emissions from the transportation sector. Government policies are instrumental in driving the demand for High Voltage Cables in this context.

Governments are offering a range of incentives to promote EV adoption, including tax credits, rebates, and grants for EV purchases. These policies encourage consumers to switch to electric vehicles and foster the growth of the EV market, which relies on High Voltage Cables for charging infrastructure.

In addition to consumer incentives, governments are investing in the expansion of public charging networks for EVs. Public charging stations, especially fast-charging stations, require High Voltage Cables to deliver power quickly and efficiently. Policies mandating the installation of EV charging infrastructure in public places and along highways further stimulate demand for these cables.

Governments are also formulating regulations that mandate a percentage of new vehicles sold to be electric, pushing automakers to expand their electric vehicle offerings. This, in turn, drives the need for High Voltage Cables in EV manufacturing.

Manufacturers in the High Voltage Cable market need to closely monitor and adapt to these government policies to align their products with the evolving electrification of transportation.

### Trade and Economic Agreements

Trade agreements and economic policies have a significant impact on the High Voltage Cable market, especially in regions with active cross-border energy trade. Governments often negotiate international agreements that facilitate the exchange of electricity between neighboring countries.

These agreements promote energy market integration, price stability, and resource optimization. They enable countries with surplus electricity generation capacity to export power to regions with higher demand. High Voltage Cables are crucial in such



interconnection projects, allowing the efficient transmission of electricity across borders.

Policies related to energy trade often involve the establishment of cross-border transmission lines, subsea cables, and interconnection infrastructure. Governments allocate funds and provide regulatory frameworks to support these projects, which, in turn, drive demand for High Voltage Cables.

Additionally, international economic policies can influence the cost and availability of raw materials used in High Voltage Cable manufacturing. Trade tariffs, import/export regulations, and currency exchange rates can impact production costs and pricing strategies for High Voltage Cable manufacturers.

Staying informed about trade agreements and economic policies is essential for businesses operating in the High Voltage Cable market to navigate international markets and seize opportunities resulting from cross-border energy trade.

### Environmental Regulations and Sustainability Initiatives

Growing environmental awareness and concerns about the impact of energy infrastructure on ecosystems are leading to stricter environmental regulations and sustainability initiatives. These policies are influencing the design and production of High Voltage Cables.

Governments are implementing policies to reduce the environmental footprint of electrical transmission systems. This includes encouraging the use of underground and subsea High Voltage Cables to minimize the visual impact on landscapes and protect wildlife habitats. In some cases, governments may mandate the burial of High Voltage Cables for specific projects.

Sustainability initiatives also drive demand for High Voltage Cables with environmentally friendly materials and manufacturing processes. Governments may incentivize the use of cables that are free from hazardous substances and have lower carbon emissions throughout their lifecycle.

Additionally, regulations related to recycling and disposal of High Voltage Cables are emerging. Governments are promoting responsible end-of-life management of cables, requiring manufacturers to consider recyclability and sustainability in their product design.

High Voltage Cable manufacturers must adapt to these environmental regulations and sustainability initiatives by developing products that align with these policies. This not only ensures compliance but also positions companies as environmentally responsible partners in the energy sector.

In conclusion, government policies significantly shape the global High Voltage Cable market. Manufacturers and industry stakeholders must closely monitor and respond to these policies to navigate regulatory environments, seize market opportunities, and contribute to the development of a sustainable and efficient electrical transmission infrastructure.

## Key Market Challenges

### Technological Advancements and Innovation

The High Voltage Cable market faces an ongoing challenge driven by rapid technological advancements and the need for continuous innovation. As global energy demands increase and the energy landscape evolves, there is a growing demand for High Voltage Cables that can handle higher capacities, minimize transmission losses, and adapt to diverse environmental conditions.

One primary technological challenge is the development of High Voltage Cables capable of efficiently transmitting electricity over extremely long distances. As renewable energy projects, such as offshore wind farms, become more prevalent, there is a need for subsea High Voltage Cables that can transmit power over hundreds of kilometers with minimal energy loss. Manufacturers are constantly striving to improve the design and materials used in these cables to achieve greater efficiency and reliability.

Additionally, High Voltage Cables need to adapt to the evolving requirements of modern smart grids. Smart grids incorporate advanced monitoring and control systems that require bidirectional communication capability, enabling real-time data exchange between the grid and power sources. High Voltage Cables must incorporate these communication features while maintaining their primary function of transmitting electricity, adding complexity to their design and manufacturing.

The development of environmentally friendly and sustainable High Voltage Cables is another technological challenge. Governments and environmental regulations increasingly emphasize the reduction of hazardous materials and the carbon footprint

associated with cable manufacturing. This requires manufacturers to explore alternative insulation materials and production processes that align with sustainability goals.

Furthermore, as the demand for electricity continues to rise with the electrification of various industries, the market faces the challenge of developing High Voltage Cables capable of transmitting extremely high voltages and currents while maintaining safety and reliability standards.

To address these technological challenges, High Voltage Cable manufacturers must invest heavily in research and development. This includes conducting extensive testing and validation of new cable designs, materials, and technologies. Collaboration with research institutions and participation in industry consortia can help accelerate innovation and keep pace with the evolving energy landscape.

### Regulatory and Environmental Compliance

Regulatory and environmental compliance represents a significant challenge for the global High Voltage Cable market. Governments and regulatory bodies worldwide impose stringent standards and requirements on the design, manufacturing, and installation of High Voltage Cables to ensure safety, reliability, and environmental sustainability.

One of the key challenges is adhering to diverse and sometimes conflicting regulations across different regions and countries. Each jurisdiction may have its own set of standards and certification requirements for High Voltage Cables. This creates a complex landscape for manufacturers, especially those operating on a global scale, as they must navigate and comply with various regulatory frameworks. Ensuring that High Voltage Cables meet these standards can be a time-consuming and resource-intensive process.

Environmental regulations are also becoming increasingly stringent, necessitating the development of High Voltage Cables that are free from hazardous substances and have a reduced carbon footprint. Manufacturers are under pressure to use materials that are environmentally friendly and recyclable while maintaining the performance and reliability of the cables.

Another challenge relates to the permitting and environmental impact assessments required for large-scale High Voltage Cable projects, especially those involving subsea or underground installations. These projects often face opposition from environmental

groups and local communities concerned about the potential disruption to ecosystems and landscapes. Obtaining the necessary permits and approvals can be a protracted and costly process, delaying project timelines and increasing overall project costs.

Additionally, ensuring worker safety during the installation and maintenance of High Voltage Cables is a critical aspect of regulatory compliance. Governments set strict safety standards, and manufacturers must provide appropriate training and equipment to personnel working with High Voltage Cables to prevent accidents and injuries.

To address these regulatory and environmental compliance challenges, High Voltage Cable manufacturers must establish robust quality control processes, engage with regulatory authorities to stay informed about evolving standards, and invest in sustainable materials and manufacturing practices. Collaboration with environmental experts and proactive engagement with local communities can also help mitigate opposition to cable projects and streamline the permitting process.

## Segmental Insights

### Underground Insights

The Underground segment held the largest market share in 2022. In densely populated urban areas, where space is limited and there is a high concentration of buildings, underground installation is preferred. It minimizes visual clutter, preserves urban aesthetics, and reduces the risk of cable damage due to accidents or severe weather conditions. Underground cables have a lower environmental impact compared to overhead installations. They do not disrupt landscapes, obstruct views, or pose hazards to wildlife. This aligns with increasing environmental regulations and sustainability goals, making underground installation more appealing. Underground cables are less susceptible to weather-related outages, such as those caused by storms, ice, or wind, which can disrupt overhead lines. This enhanced reliability is critical for urban areas and industries that require uninterrupted power supply. In residential and commercial areas, underground cables are favored for their aesthetic benefits. They do not mar the skyline with unsightly power lines and support structures, contributing to a more attractive and pleasant environment. Underground cables are less accessible to the general public, reducing the risk of accidents and electrocutions. This enhances overall safety, particularly in densely populated areas where public safety is a significant concern. The growth of real estate development often involves the installation of underground High Voltage Cables to meet modern infrastructure standards and to cater to the power demands of new residential and commercial properties. In many regions, governments

and regulatory bodies have implemented policies and standards that encourage or mandate underground cable installation, especially in urban and environmentally sensitive areas. Advances in cable technology, including improved insulation materials and fault detection systems, have made underground High Voltage Cables more reliable and efficient, further driving their adoption.

## Utility Insights

The Utility segment held the largest market share in 2022. Utility companies are responsible for the generation, transmission, and distribution of electricity to homes, businesses, and industries. To meet growing energy demands and ensure grid reliability, utilities frequently expand and upgrade their electrical infrastructure. High Voltage Cables are a fundamental component of these efforts, allowing utilities to efficiently transmit electricity over long distances with minimal energy loss. The global shift towards renewable energy sources, such as wind and solar power, has spurred the need for High Voltage Cables in the utility sector. These cables are essential for connecting remote renewable energy generation sites to the electrical grid. As governments and utilities invest in clean energy projects, the demand for High Voltage Cables continues to rise. Aging electrical grids require modernization to improve efficiency, reliability, and resilience. Utility companies are investing in grid modernization projects, which often involve the installation of advanced High Voltage Cables. These cables support the integration of smart grid technologies, such as real-time monitoring and control systems, enhancing overall grid performance. Utility companies frequently transmit electricity over extensive distances, especially in regions with dispersed population centers or remote power generation sites. High Voltage Cables are the preferred choice for these long-distance transmission projects due to their ability to minimize energy losses and deliver power efficiently. **Safety and Reliability:** Utility companies prioritize the safety and reliability of their electrical infrastructure. High Voltage Cables offer enhanced safety as they are designed to withstand high voltages and are insulated to prevent electrical faults. Their robust construction makes them less susceptible to damage from weather-related events, improving grid reliability. Utility companies are subject to stringent regulatory standards and requirements related to grid operation, safety, and environmental impact. High Voltage Cables must meet these regulations, ensuring compliance is a key consideration when procuring cables. The utility sector's role in providing essential services makes it a critical component of a nation's infrastructure. The reliability and efficiency of electrical transmission systems are vital to the functioning of society, making High Voltage Cables indispensable. Governments and utilities often allocate substantial budgets to infrastructure investments, including the installation and maintenance of High Voltage Cables. These

investments drive consistent demand for High Voltage Cables in the utility sector.

## Regional Insights

### Asia Pacific

Asia Pacific is the largest and fastest-growing region in the global high voltage cable market. This is due to a number of factors, including:

Rapid economic growth

Increasing demand for electricity

Growing investments in infrastructure development

Need to replace aging infrastructure.

Some of the key markets in the Asia Pacific region include China, India, Japan, South Korea, and Australia.

### North America

North America is the second-largest market for high-voltage cables. The market in this region is driven by factors such as:

Growing demand for electricity from renewable energy sources

Expansion of power grids to meet growing electricity demand.

Need to replace aging infrastructure.

Some of the key markets in North America include the United States and Canada.

### Europe

Europe is the third-largest market for high voltage cables. The market in this region is driven by factors such as:

Need to replace aging infrastructure.

Expansion of power grids to meet growing electricity demand.

Growing investments in renewable energy projects

Some of the key markets in Europe include Germany, the United Kingdom, France, and Italy.

Key Market Players

Prysmian Group

NKT Cables

Nexans S.A.

Southwire Company, LLC

Sumitomo Electric Industries, Ltd.

Hitachi, Ltd.

Kerlink SA

LS Cable & System Ltd

Fujikura Ltd

Report Scope:

In this report, the Global High Voltage Cable Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

High Voltage Cable Market, By Installation:

Overhead

Underground

Submarine

High Voltage Cable Market, By Voltage:

100 kV – 250 kV

251 kV – 400 kV

Above 400 kV

High Voltage Cable Market, By End-User:

Industrial

Utility

Commercial

High Voltage Cable Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany



Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global High Voltage Cable Market.

## Available Customizations

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
- 1.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
  - 2.5.1. Secondary Research
  - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
  - 2.6.1. The Bottom-Up Approach
  - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
  - 2.8.1. Data Triangulation & Validation

### **3. EXECUTIVE SUMMARY**

### **4. VOICE OF CUSTOMER**

### **5. GLOBAL HIGH VOLTAGE CABLE MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Installation (Overhead, Underground, Submarine),
  - 5.2.2. By Voltage (100 kV – 250 kV, 251 kV – 400 kV, Above 400 kV),

- 5.2.3. By End-User (Industrial, Utility, Commercial)
- 5.2.4. By Region
- 5.2.5. By Company (2022)
- 5.3. Market Map

## **6. NORTH AMERICA HIGH VOLTAGE CABLE MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Installation
  - 6.2.2. By Voltage
  - 6.2.3. By End-User
  - 6.2.4. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States High Voltage Cable Market Outlook
    - 6.3.1.1. Market Size & Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share & Forecast
      - 6.3.1.2.1. By Installation
      - 6.3.1.2.2. By Voltage
      - 6.3.1.2.3. By End-User
  - 6.3.2. Canada High Voltage Cable Market Outlook
    - 6.3.2.1. Market Size & Forecast
      - 6.3.2.1.1. By Value
    - 6.3.2.2. Market Share & Forecast
      - 6.3.2.2.1. By Installation
      - 6.3.2.2.2. By Voltage
      - 6.3.2.2.3. By End-User
  - 6.3.3. Mexico High Voltage Cable Market Outlook
    - 6.3.3.1. Market Size & Forecast
      - 6.3.3.1.1. By Value
    - 6.3.3.2. Market Share & Forecast
      - 6.3.3.2.1. By Installation
      - 6.3.3.2.2. By Voltage
      - 6.3.3.2.3. By End-User

## **7. EUROPE HIGH VOLTAGE CABLE MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By Installation
  - 7.2.2. By Voltage
  - 7.2.3. By End-User
  - 7.2.4. By Country
- 7.3. Europe: Country Analysis
  - 7.3.1. Germany High Voltage Cable Market Outlook
    - 7.3.1.1. Market Size & Forecast
      - 7.3.1.1.1. By Value
    - 7.3.1.2. Market Share & Forecast
      - 7.3.1.2.1. By Installation
      - 7.3.1.2.2. By Voltage
      - 7.3.1.2.3. By End-User
  - 7.3.2. United Kingdom High Voltage Cable Market Outlook
    - 7.3.2.1. Market Size & Forecast
      - 7.3.2.1.1. By Value
    - 7.3.2.2. Market Share & Forecast
      - 7.3.2.2.1. By Installation
      - 7.3.2.2.2. By Voltage
      - 7.3.2.2.3. By End-User
  - 7.3.3. Italy High Voltage Cable Market Outlook
    - 7.3.3.1. Market Size & Forecast
      - 7.3.3.1.1. By Value
    - 7.3.3.2. Market Share & Forecast
      - 7.3.3.2.1. By Installation
      - 7.3.3.2.2. By Voltage
      - 7.3.3.2.3. By End-User
  - 7.3.4. France High Voltage Cable Market Outlook
    - 7.3.4.1. Market Size & Forecast
      - 7.3.4.1.1. By Value
    - 7.3.4.2. Market Share & Forecast
      - 7.3.4.2.1. By Installation
      - 7.3.4.2.2. By Voltage
      - 7.3.4.2.3. By End-User
  - 7.3.5. Spain High Voltage Cable Market Outlook
    - 7.3.5.1. Market Size & Forecast
      - 7.3.5.1.1. By Value

#### 7.3.5.2. Market Share & Forecast

##### 7.3.5.2.1. By Installation

##### 7.3.5.2.2. By Voltage

##### 7.3.5.2.3. By End-User

## **8. ASIA-PACIFIC HIGH VOLTAGE CABLE MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Installation

#### 8.2.2. By Voltage

#### 8.2.3. By End-User

#### 8.2.4. By Country

### 8.3. Asia-Pacific: Country Analysis

#### 8.3.1. China High Voltage Cable Market Outlook

##### 8.3.1.1. Market Size & Forecast

###### 8.3.1.1.1. By Value

##### 8.3.1.2. Market Share & Forecast

###### 8.3.1.2.1. By Installation

###### 8.3.1.2.2. By Voltage

###### 8.3.1.2.3. By End-User

#### 8.3.2. India High Voltage Cable Market Outlook

##### 8.3.2.1. Market Size & Forecast

###### 8.3.2.1.1. By Value

##### 8.3.2.2. Market Share & Forecast

###### 8.3.2.2.1. By Installation

###### 8.3.2.2.2. By Voltage

###### 8.3.2.2.3. By End-User

#### 8.3.3. Japan High Voltage Cable Market Outlook

##### 8.3.3.1. Market Size & Forecast

###### 8.3.3.1.1. By Value

##### 8.3.3.2. Market Share & Forecast

###### 8.3.3.2.1. By Installation

###### 8.3.3.2.2. By Voltage

###### 8.3.3.2.3. By End-User

#### 8.3.4. South Korea High Voltage Cable Market Outlook

##### 8.3.4.1. Market Size & Forecast

###### 8.3.4.1.1. By Value

- 8.3.4.2. Market Share & Forecast
  - 8.3.4.2.1. By Installation
  - 8.3.4.2.2. By Voltage
  - 8.3.4.2.3. By End-User
- 8.3.5. Australia High Voltage Cable Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Installation
    - 8.3.5.2.2. By Voltage
    - 8.3.5.2.3. By End-User

## **9. SOUTH AMERICA HIGH VOLTAGE CABLE MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Installation
  - 9.2.2. By Voltage
  - 9.2.3. By End-User
  - 9.2.4. By Country
- 9.3. South America: Country Analysis
  - 9.3.1. Brazil High Voltage Cable Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Installation
      - 9.3.1.2.2. By Voltage
      - 9.3.1.2.3. By End-User
  - 9.3.2. Argentina High Voltage Cable Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Installation
      - 9.3.2.2.2. By Voltage
      - 9.3.2.2.3. By End-User
  - 9.3.3. Colombia High Voltage Cable Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value

- 9.3.3.2. Market Share & Forecast
  - 9.3.3.2.1. By Installation
  - 9.3.3.2.2. By Voltage
  - 9.3.3.2.3. By End-User

## **10. MIDDLE EAST AND AFRICA HIGH VOLTAGE CABLE MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Installation
  - 10.2.2. By Voltage
  - 10.2.3. By End-User
  - 10.2.4. By Country
- 10.3. MEA: Country Analysis
  - 10.3.1. South Africa High Voltage Cable Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Installation
      - 10.3.1.2.2. By Voltage
      - 10.3.1.2.3. By End-User
  - 10.3.2. Saudi Arabia High Voltage Cable Market Outlook
    - 10.3.2.1. Market Size & Forecast
      - 10.3.2.1.1. By Value
    - 10.3.2.2. Market Share & Forecast
      - 10.3.2.2.1. By Installation
      - 10.3.2.2.2. By Voltage
      - 10.3.2.2.3. By End-User
  - 10.3.3. UAE High Voltage Cable Market Outlook
    - 10.3.3.1. Market Size & Forecast
      - 10.3.3.1.1. By Value
    - 10.3.3.2. Market Share & Forecast
      - 10.3.3.2.1. By Installation
      - 10.3.3.2.2. By Voltage
      - 10.3.3.2.3. By End-User
  - 10.3.4. Kuwait High Voltage Cable Market Outlook
    - 10.3.4.1. Market Size & Forecast
      - 10.3.4.1.1. By Value



#### 10.3.4.2. Market Share & Forecast

##### 10.3.4.2.1. By Installation

##### 10.3.4.2.2. By Voltage

##### 10.3.4.2.3. By End-User

#### 10.3.5. Turkey High Voltage Cable Market Outlook

##### 10.3.5.1. Market Size & Forecast

##### 10.3.5.1.1. By Value

##### 10.3.5.2. Market Share & Forecast

##### 10.3.5.2.1. By Installation

##### 10.3.5.2.2. By Voltage

##### 10.3.5.2.3. By End-User

## 11. MARKET DYNAMICS

## 12. MARKET TRENDS & DEVELOPMENTS

## 13. COMPANY PROFILES

### 13.1. Prysmian Group

#### 13.1.1. Business Overview

#### 13.1.2. Key Revenue and Financials

#### 13.1.3. Recent Developments

#### 13.1.4. Key Personnel/Key Contact Person

#### 13.1.5. Key Product/Services Offered

### 13.2. NKT Cables

#### 13.2.1. Business Overview

#### 13.2.2. Key Revenue and Financials

#### 13.2.3. Recent Developments

#### 13.2.4. Key Personnel/Key Contact Person

#### 13.2.5. Key Product/Services Offered

### 13.3. Nexans S.A.

#### 13.3.1. Business Overview

#### 13.3.2. Key Revenue and Financials

#### 13.3.3. Recent Developments

#### 13.3.4. Key Personnel/Key Contact Person

#### 13.3.5. Key Product/Services Offered

### 13.4. Southwire Company, LLC

- 13.4.1. Business Overview
- 13.4.2. Key Revenue and Financials
- 13.4.3. Recent Developments
- 13.4.4. Key Personnel/Key Contact Person
- 13.4.5. Key Product/Services Offered
- 13.5. Sumitomo Electric Industries, Ltd.
  - 13.5.1. Business Overview
  - 13.5.2. Key Revenue and Financials
  - 13.5.3. Recent Developments
  - 13.5.4. Key Personnel/Key Contact Person
  - 13.5.5. Key Product/Services Offered
- 13.6. Hitachi, Ltd.
  - 13.6.1. Business Overview
  - 13.6.2. Key Revenue and Financials
  - 13.6.3. Recent Developments
  - 13.6.4. Key Personnel/Key Contact Person
  - 13.6.5. Key Product/Services Offered
- 13.7. Kerlink SA
  - 13.7.1. Business Overview
  - 13.7.2. Key Revenue and Financials
  - 13.7.3. Recent Developments
  - 13.7.4. Key Personnel/Key Contact Person
  - 13.7.5. Key Product/Services Offered
- 13.8. LS Cable & System Ltd
  - 13.8.1. Business Overview
  - 13.8.2. Key Revenue and Financials
  - 13.8.3. Recent Developments
  - 13.8.4. Key Personnel/Key Contact Person
  - 13.8.5. Key Product/Services Offered
- 13.9. Fujikura Ltd
  - 13.9.1. Business Overview
  - 13.9.2. Key Revenue and Financials
  - 13.9.3. Recent Developments
  - 13.9.4. Key Personnel/Key Contact Person
  - 13.9.5. Key Product/Services Offered

## **14. STRATEGIC RECOMMENDATIONS**

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