

Offshore Wind Power Generation Submarine Power Cable Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented by Type (Single Core, Multicore), By Voltage (Medium Voltage, High Voltage), By Region, Competition 2018-2028.

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Abstracts

Global Offshore Wind Power Generation Submarine Power Cable Market has valued at USD 6.82 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 12.79% through 2028.

Key Market Drivers

Increasing Offshore Wind Energy Capacity

The increasing offshore wind energy capacity is a key driver behind the burgeoning global offshore wind power generation submarine power cable market. This robust growth in offshore wind capacity is catalyzing a surge in demand for submarine power cables, with several interrelated factors contributing to this trend. First and foremost, offshore wind energy capacity is expanding at a rapid pace globally. Governments and energy companies are investing heavily in offshore wind projects due to their significant potential for clean, renewable energy generation. As wind turbines are installed farther from the coastlines and in deeper waters to harness stronger and more consistent winds, the need for efficient and reliable submarine power cables becomes paramount. These cables serve as the vital link between offshore wind turbines and onshore power grids, enabling the transportation of electricity over long distances.

Furthermore, the escalating demand for offshore wind energy is closely tied to environmental concerns and the imperative to reduce greenhouse gas emissions.

Governments worldwide are setting ambitious renewable energy targets as part of their efforts to combat climate change. Offshore wind power is recognized as a sustainable and eco-friendly energy source, aligning with these goals. This recognition translates into strong support from governments and regulatory bodies, which, in turn, fosters the development of offshore wind farms and their associated submarine cable networks. Technological advancements have also played a pivotal role in expanding offshore wind energy capacity. Innovations in wind turbine design, materials, and installation techniques have boosted the efficiency and output of offshore wind farms. These advancements have resulted in larger and more powerful turbines that require more sophisticated submarine power cables to handle the increased electricity transmission requirements.

Additionally, offshore wind energy contributes to energy security by diversifying the energy mix and reducing reliance on fossil fuels. This is especially critical as energy demand continues to rise globally. Offshore wind farms are seen as a stable and predictable energy source, enhancing energy security and reliability. In conclusion, the increasing offshore wind energy capacity is driving the global offshore wind power generation submarine power cable market by creating a strong demand for these essential components. As countries continue to invest in offshore wind projects to meet their renewable energy targets and combat climate change, the submarine power cable market is poised for sustained growth as a critical enabler of the offshore wind energy sector.

Government Support and Policies

Government support and policies play a pivotal role in driving the growth of the global offshore wind power generation submarine power cable market. These measures are instrumental in incentivizing, regulating, and facilitating the expansion of offshore wind energy projects, which in turn increases the demand for submarine power cables. Here's a detailed exploration of how government support and policies are shaping this market, First and foremost, governments worldwide are committed to combating climate change and reducing greenhouse gas emissions. Offshore wind power is a key component of their strategies to achieve these goals. To promote the development of offshore wind energy, governments often establish ambitious renewable energy targets, which create a strong market pull for submarine power cables as they are essential for transmitting electricity generated offshore to onshore grids.

Furthermore, governments provide financial incentives to offshore wind projects. These incentives may include tax credits, subsidies, feed-in tariffs, or grants, all of which make

offshore wind power generation a financially attractive proposition for developers. As developers embark on new projects, they require extensive submarine power cable networks to ensure efficient and reliable transmission of electricity, thereby driving demand in the submarine cable market.

Regulatory frameworks are crucial for the offshore wind industry's success. Governments establish clear permitting processes, environmental standards, and safety regulations that provide certainty to developers and investors. A streamlined regulatory environment reduces delays and uncertainties, making it easier to plan and execute offshore wind projects, including the installation of submarine power cables. In many regions, governments facilitate grid connections for offshore wind farms by investing in the necessary onshore and nearshore grid infrastructure. They may also support the development of offshore transmission networks, further boosting the demand for submarine power cables.

Additionally, governments promote research and development in cable technology and offshore wind energy. Funding for innovation and technology improvement initiatives helps drive advancements in submarine power cable design, materials, and installation techniques, enhancing their efficiency and performance. In conclusion, government support and policies act as catalysts for the global offshore wind power generation submarine power cable market. By setting ambitious renewable energy targets, offering financial incentives, establishing regulatory frameworks, investing in grid infrastructure, and supporting technological innovation, governments foster an environment in which offshore wind projects can thrive. As the world's transition to cleaner energy sources accelerates, the submarine power cable market will continue to benefit from this governmental commitment to offshore wind power generation.

Technological Advancements

Technological advancements are a significant driving force propelling the growth of the global offshore wind power generation submarine power cable market. These advancements are transforming the capabilities and efficiency of submarine power cables, making them a critical component in the expansion of offshore wind energy. Here's an in-depth exploration of how technological innovations are shaping this market, Higher Capacity Cables: Technological advancements have enabled the development of high-capacity submarine power cables that can transmit more electricity over longer distances. This is crucial for offshore wind farms, as they often need to transport large amounts of electricity from remote locations to onshore grids.

Advanced Materials: Innovations in cable materials have resulted in cables that can withstand the harsh marine environment, including saltwater corrosion and extreme temperatures. These materials enhance the durability and lifespan of submarine power cables, reducing maintenance costs and downtime. **HVDC Technology:** High-voltage direct current (HVDC) technology has revolutionized underwater power transmission. HVDC submarine cables are more efficient for long-distance transmission, experience lower losses, and are better at connecting offshore wind farms to onshore grids, especially when the farms are located far from the coast.

Dynamic Cable Monitoring: Technological advancements have introduced real-time monitoring and diagnostic systems for submarine power cables. These systems can detect faults, such as cable damage or overheating, allowing for prompt maintenance and minimizing downtime. They enhance the reliability and safety of offshore wind energy transmission. **Installation Techniques:** Innovations in cable laying and installation techniques have improved the efficiency and cost-effectiveness of deploying submarine power cables. State-of-the-art cable laying vessels and remotely operated vehicles (ROVs) are used to streamline the installation process, reducing project timelines.

Grid Integration: Advancements in grid integration technology allow for seamless connection of offshore wind farms to onshore grids. Smart grid technologies and grid management systems ensure efficient electricity distribution, making it easier to incorporate offshore wind energy into the existing energy infrastructure. **Repurposing Decommissioned Cables:** Innovations in recycling and repurposing old submarine cables have environmental and cost-saving benefits. Decommissioned cables can be repurposed for other uses or recycled, reducing waste and lowering the overall cost of new cable installations.

Energy Storage Integration: The integration of energy storage systems with submarine power cables allows for the efficient storage and dispatch of offshore wind energy, improving grid stability and flexibility. In conclusion, technological advancements are revolutionizing the global offshore wind power generation submarine power cable market. These innovations are making submarine power cables more reliable, efficient, and cost-effective, which is essential for supporting the rapid growth of offshore wind energy projects worldwide. As technology continues to evolve, it will further enhance the role of submarine power cables in facilitating the transition to clean and sustainable offshore wind energy.

Key Market Challenges

Environmental and Regulatory Challenges

Submarine cable installation may necessitate trenching or plowing the seabed, potentially disrupting marine habitats and ecosystems. The operation of cable-laying vessels and machinery can generate underwater noise pollution, adversely affecting marine life, especially sensitive species like whales and dolphins. Furthermore, the discharge of drilling fluids and sediments during cable burial can result in water quality concerns.

Ensuring compliance with a wide array of national and international regulations is crucial to mitigate environmental impacts and safeguard marine ecosystems. Achieving regulatory compliance can be a multifaceted process, involving obtaining permits, conducting environmental impact assessments, and adhering to stringent operational guidelines. Navigating the regulatory landscape can be time-consuming and impose significant costs on cable project developers.

While the global offshore wind power generation submarine power cable market holds significant potential for growth, it faces several environmental and regulatory challenges that could potentially hamper its development. These challenges have the potential to increase costs, cause delays, and introduce uncertainties into offshore wind projects. Here are some of the key environmental and regulatory challenges, Environmental Impact Assessment (EIA): Offshore wind projects often require thorough EIAs to assess their potential environmental impacts. These assessments can delay project approvals and increase costs. Concerns include the disruption of marine ecosystems, impacts on marine species, and potential disturbances to fishing and shipping activities. Marine Habitat and Wildlife Protection: Offshore wind farms can affect marine habitats and wildlife, particularly during construction and maintenance activities. The presence of submarine power cables may intersect with sensitive areas, posing risks to marine life. Mitigation measures are required to address these concerns, which can increase project costs and complexity.

Cable Routing Challenges: Selecting the optimal route for submarine power cables is a complex process. Avoiding sensitive habitats, archaeological sites, and existing infrastructure while ensuring minimal impact on the marine environment is challenging. **Environmental regulations** often dictate cable routing decisions, which can lead to suboptimal solutions. **Permitting and Regulatory Hurdles:** The permitting process for offshore wind projects, including submarine cable installation, can be protracted and complex due to multiple regulatory agencies, environmental assessments, and public consultations. Delays in obtaining permits can lead to increased project costs and

uncertainties for investors.

International Borders and Jurisdictions: Offshore wind farms often straddle international borders or are located in exclusive economic zones. Coordinating regulations and permitting across jurisdictions can be complicated, adding to project complexity and timelines. **Cultural and Archaeological Considerations:** Offshore areas may contain cultural or archaeological sites, such as shipwrecks or historical artifacts. These sites must be protected during cable installation, potentially requiring changes in cable routing and additional costs for archaeological surveys and protections. **Grid Connection Challenges:** Connecting offshore wind farms to onshore grids may involve navigating complex regulatory requirements and grid infrastructure upgrades. Delays in grid connection can impact project timelines and profitability.

Public Opposition: Some offshore wind projects face opposition from local communities and environmental groups due to perceived negative impacts on scenic views, fishing industries, or tourism. This can result in legal challenges and delays. While these environmental and regulatory challenges can hamper the global offshore wind power generation submarine power cable market, they also present opportunities for industry stakeholders to develop innovative solutions, advance technologies for minimizing environmental impacts, and work collaboratively with regulators and communities to address concerns. Overcoming these challenges is essential for realizing the potential of offshore wind energy as a clean and sustainable power source.

Technical and Engineering Challenges

Submarine power cables must endure harsh conditions, including corrosive saltwater, temperature fluctuations, and mechanical stresses caused by currents and tides. These factors can gradually deteriorate the cable's insulation, leading to electrical faults. Ensuring long-term cable reliability poses a significant technical challenge.

The installation of submarine power cables in deep and remote ocean locations presents logistical complexities. Successful installation requires cable-laying vessels, specialized equipment, and highly skilled personnel. Additionally, addressing cable faults or damages can be intricate and expensive, often necessitating the use of specialized vessels and remotely operated vehicles (ROVs) for underwater repairs.

Constant vigilance is essential to protect submarine power cables from external threats, such as anchor damage, fishing activities, or natural events like undersea landslides. Implementing innovative cable protection measures, including armored sheaths and

appropriate burial depths, is crucial for safeguarding cable infrastructure.

Key Market Trends

One of the key trends observed in the global submarine power cable market is the growing demand for the integration of renewable energy sources into the grid. As the world moves towards cleaner and more sustainable energy systems, there is an increasing requirement to connect offshore renewable energy installations, such as offshore wind farms and tidal energy projects, to onshore grids. Submarine power cables play a crucial role in transmitting electricity generated offshore to population centers.

The rapid expansion of offshore wind energy serves as a significant driver for this trend. Numerous countries are making substantial investments in offshore wind farms located in their coastal waters. Submarine power cables are essential for connecting the offshore turbines to onshore substations, enabling the efficient transportation of wind-generated electricity to the grid.

In addition to wind energy, there is a growing interest in harnessing tidal and wave energy. These marine energy sources have the potential to provide a consistent and predictable source of renewable electricity, particularly in regions with strong tidal currents or consistent wave patterns. Submarine power cables are vital for transmitting electricity generated by these sources to onshore facilities.

The trend towards integrating renewable energy is stimulating the need for enhanced grid infrastructure. Submarine power cables are becoming integral components of grid modernization efforts, facilitating the efficient and reliable integration of intermittent renewable energy sources. As this trend continues, submarine power cables will play a pivotal role in enabling the transition to a cleaner and more sustainable energy mix.

Technological Advancements for Higher Capacity and Efficiency

One notable trend observed in the industry is the increasing adoption of high-voltage direct current (HVDC) submarine power cables. HVDC technology offers significant advantages, such as reduced transmission losses over long distances and the ability to connect offshore installations to onshore grids even at remote locations. HVDC submarine cables are particularly well-suited for interconnectors and projects where high capacity and efficiency are of utmost importance.

Technological advancements have also revolutionized cable monitoring and maintenance practices. Cutting-edge real-time monitoring systems and underwater robotic vehicles (ROVs) equipped with cable inspection capabilities have witnessed remarkable progress. These sophisticated technologies play a crucial role in promptly detecting and addressing cable faults and damages, thereby minimizing downtime and enhancing overall cable reliability.

Segmental Insights

Type Insights

Single Core segment is expected to dominate the market during the forecast period. A single core submarine power cable is a type of submarine cable that features a solitary central conductor within its insulating sheath. This conductor carries the electrical current and is typically surrounded by multiple layers of insulation, protection, and, in some cases, armor.

In comparison to multi-core cables, single core submarine power cables have a simpler design due to their single conductor configuration. This simplicity facilitates easier manufacturing, installation, and maintenance processes. Single core submarine power cables find extensive use in high voltage applications, where a single large conductor efficiently transmits a substantial amount of electricity. They are commonly employed in interconnectors, offshore wind farms, and long-distance undersea transmission projects.

High-voltage direct current (HVDC) transmission systems, increasingly utilized for long-distance power transmission, often rely on single core submarine power cables. HVDC technology enables efficient transmission over extended distances, and a single core cable is capable of handling the high voltage and current levels required. Single core cables typically exhibit lower capacitance compared to multi-core cables, which proves advantageous in high-voltage applications by minimizing losses and enhancing overall cable performance.

Voltage Insights

High Voltage segment is expected to dominate the market during the forecast period. High voltage submarine power cables play a crucial role in the efficient and reliable transmission of electrical power over long distances beneath the sea. They are extensively utilized to connect electrical grids between different countries or regions, facilitating the exchange of electricity, enhancing energy security, and supporting the

integration of renewable energy sources.

Offshore wind farms are a significant driver of demand for high voltage submarine power cables as they connect offshore wind turbines to onshore substations, enabling the transmission of electricity to the grid. These cables are designed with insulation and conductor materials that can withstand the stresses associated with high voltage levels, ensuring safe and reliable transmission of electricity.

Moreover, high voltage transmission reduces electrical losses during long-distance transmission, resulting in more efficient power delivery, which is especially critical for transmitting electricity over extended undersea routes. The design of high voltage submarine power cables is specifically tailored for efficient long-distance power transmission, making them ideal for interconnectors, offshore wind farms, and undersea HVDC transmission projects. The high voltage segment plays a pivotal role in integrating renewable energy sources such as offshore wind and marine energy into the grid, enabling the transport of clean energy generated offshore to meet onshore electricity demand.

Regional Insights

Asia Pacific emerged as the dominant region in the Global Offshore Wind Power Generation Submarine Power Cable Market in 2022. China is leading the way, followed by ASEAN countries. The Chinese government is actively promoting the development of renewable infrastructure to combat pollution and reduce reliance on thermal power generation. This initiative is expected to drive the growth of wind power projects in China during the forecast period. China took the lead in the offshore wind market by installing 1.8 GW in 2018, surpassing the United Kingdom.

The Indian offshore wind power market is still in its early stages, with a potential capacity of around 60 GW. The coastal regions of Gujarat and Tamil Nadu are identified as potential areas for offshore wind power in India. The Ministry of New and Renewable Energy (MNRE) is prioritizing the development of offshore wind power and has announced a draft offshore wind energy policy.

With Japan and ASEAN countries consisting of many islands, there is a significant need for power transmission between these islands. Japan, in particular, has favorable locations for offshore wind power generation and has recognized that offshore wind turbines can generate significantly more electricity than onshore wind turbines.

Additionally, land constraints pose challenges for the future development of onshore wind farms. The Philippines, with over 7,500 islands, including 2,000 inhabited islands, and other ASEAN countries with clusters of small islands, face the challenge of power generation on each individual island. This necessitates the use of submarine power cables for inter-island power transmission, leading to an increased demand for such cables.

Key Market Players

ABB Ltd.

Furukawa Electric Co Ltd

KEI Industries Limited

LS Cable & System Ltd

Nexans SA

Ningbo Orient Wires & Cables Co., Ltd

NKT A/S

Prysmian Group

Sumitomo Electric Industries Limited

ZTT International Limited

Report Scope:

In this report, the Global Offshore Wind Power Generation Submarine Power Cable Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Offshore Wind Power Generation Submarine Power Cable Market, By Type:

Single Core

Multicore

Global Offshore Wind Power Generation Submarine Power Cable Market, By
Voltage:

Medium Voltage

High Voltage

Global Offshore Wind Power Generation Submarine Power Cable Market, By
Region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

Japan

South Korea

Indonesia

Europe

Germany

United Kingdom

France

Russia

Spain

South America

Brazil

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Egypt

UAE

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Offshore Wind Power Generation Submarine Power Cable Market.

Available Customizations:

Global Offshore Wind Power Generation Submarine Power Cable Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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