

Overhead DC Electric Cable Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Voltage Rating (High voltage, Medium voltage, Low voltage), By Component (Conductor, Insulators, Fittings & Accessories), By End User (Utilities & Power Grids, IT & Telecom, Automotive & Transportation, Electronics), By Region, By Competition, 2018-2028

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Abstracts

Global Overhead DC Electric 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 5.19% through 2028.

The Overhead DC Electric Cable market refers to the global industry segment focused on the production, distribution, and utilization of high-voltage direct current (HVDC) cables designed for above-ground, aerial transmission of electrical power. These cables are an essential component of modern electrical infrastructure, facilitating the efficient, long-distance transmission of electricity from power generation sources to demand centers.

Overhead DC Electric Cables are characterized by their ability to transmit electricity in a unidirectional manner, minimizing energy losses during transport compared to traditional alternating current (AC) cables. This market encompasses a wide range of cable types, including overhead transmission lines, conductors, insulators, and support structures.

Key drivers of this market include the integration of renewable energy sources, urbanization and infrastructure development, energy efficiency initiatives, cross-border power trading, electrification of transportation, and ongoing technological advancements. Governments, utilities, and private sector players collaborate to meet the increasing demand for electricity, enhance grid reliability, and reduce environmental impacts.

The Overhead DC Electric Cable market plays a crucial role in modernizing power grids, supporting renewable energy integration, and ensuring a stable and efficient supply of electricity across local, regional, and international scales.

Key Market Drivers

Renewable Energy Integration

The integration of renewable energy sources, such as wind and solar power, into the global energy mix is a significant driver of the Overhead DC Electric Cable market. As nations strive to reduce greenhouse gas emissions and transition away from fossil fuels, they are increasingly investing in renewable energy infrastructure. Overhead DC Electric Cables are crucial in transmitting electricity generated from remote renewable energy sites to urban centers where the demand for power is highest.

One of the primary reasons for the preference for DC cables in renewable energy projects is their efficiency. DC transmission allows for long-distance electricity transport with minimal energy losses compared to traditional AC transmission. This efficiency is especially important for offshore wind farms and solar installations in desolate regions.

Furthermore, the modularity and scalability of Overhead DC Electric Cables make them adaptable to various renewable energy projects. Whether it's connecting solar arrays in the desert or offshore wind turbines in the open sea, DC cables can be customized to suit the specific needs of each installation.

Urbanization and Infrastructure Development

Rapid urbanization and the development of new infrastructure are driving the demand for Overhead DC Electric Cables. As more people migrate to cities, the demand for electricity in urban areas increases significantly. To meet this demand, power distribution networks must be expanded and modernized, often requiring the installation of overhead DC cables.

Overhead DC cables offer several advantages in urban settings. They are less invasive during installation, require fewer rights-of-way, and can be suspended above roads and buildings, minimizing disruption to densely populated areas. Additionally, they are known for their reliability, ensuring a steady power supply to urban residents and businesses.

The growing need for electric vehicle (EV) charging infrastructure in cities is another factor contributing to the demand for Overhead DC Electric Cables. As EV adoption continues to rise, the installation of charging stations requires efficient power distribution, which DC cables are well-suited to provide.

Energy Efficiency and Grid Modernization

Energy efficiency and grid modernization efforts are key drivers in the Overhead DC Electric Cable market. Aging power grids in many regions are in dire need of upgrading to meet the demands of the 21st century. DC cables play a vital role in grid modernization projects due to their superior energy efficiency.

Compared to AC transmission, DC transmission experiences fewer losses, especially over long distances. This reduction in energy losses translates to cost savings and a more sustainable power distribution network. Governments and utilities are increasingly investing in grid modernization projects that involve the replacement or augmentation of existing AC infrastructure with Overhead DC Electric Cables.

Furthermore, the ability to integrate DC cables with advanced technologies such as high-voltage direct current (HVDC) systems and smart grid solutions further enhances the efficiency and reliability of power transmission and distribution.

Cross-Border Power Trading

Cross-border power trading has become a critical aspect of global energy markets, and Overhead DC Electric Cables are instrumental in facilitating this exchange of electricity resources. Neighboring countries often collaborate to balance their energy supply and demand, harnessing surplus power from one region to meet shortages in another.

Overhead DC cables excel in cross-border power trading scenarios because of their capacity for long-distance transmission without significant energy losses. This enables nations to exchange electricity efficiently and economically, contributing to grid stability

and reducing reliance on local energy sources.

Moreover, cross-border power trading encourages the diversification of energy sources, which can enhance energy security and reduce the environmental impact of power generation. As countries seek to optimize their energy resources and reduce carbon emissions, the demand for Overhead DC Electric Cables in cross-border transmission projects continues to grow.

Electrification of Transportation

The global shift toward electrification of transportation, including electric vehicles (EVs) and electrified railways, is driving the demand for Overhead DC Electric Cables. The widespread adoption of EVs requires the establishment of robust charging infrastructure, which relies on efficient power distribution systems.

Overhead DC Electric Cables are essential for the installation of charging stations along highways, in parking lots, and within urban centers. These cables enable the rapid charging of EVs, supporting the growth of this environmentally friendly mode of transportation.

In addition to EVs, electric railways are gaining popularity for their efficiency and reduced carbon footprint. Overhead DC Electric Cables provide the necessary power supply for electrified rail networks, ensuring the smooth operation of trains while minimizing emissions and noise pollution.

As governments and transportation authorities invest in electrified transportation options, the demand for Overhead DC Electric Cables in this sector is poised to increase significantly.

Technological Advancements

Technological advancements in cable design and materials are driving innovation in the Overhead DC Electric Cable market. These innovations are improving the performance, efficiency, and reliability of overhead DC cables, making them even more appealing for various applications.

One notable advancement is the development of high-temperature superconductors, which can significantly reduce energy losses during transmission. These superconductors enable the creation of more efficient and compact DC cable systems,

especially for long-distance and high-capacity applications.

Furthermore, ongoing research and development efforts are focused on improving cable materials, insulation, and manufacturing techniques, leading to cables that can operate under extreme conditions, such as high temperatures or harsh weather. These advancements expand the range of environments where Overhead DC Electric Cables can be deployed.

In conclusion, the global Overhead DC Electric Cable market is influenced by several significant drivers, including the integration of renewable energy, urbanization, energy efficiency, cross-border power trading, electrification of transportation, and ongoing technological advancements. These factors collectively contribute to the increasing demand for Overhead DC Electric Cables in various sectors and regions, making them a pivotal component of modern electrical infrastructure.

Government Policies are Likely to Propel the Market

Renewable Energy Mandates and Incentives

Governments around the world are implementing policies to promote renewable energy sources as part of their efforts to combat climate change and reduce carbon emissions. One of the most significant policies in this regard is the establishment of renewable energy mandates and incentives.

Renewable energy mandates require utilities and energy providers to obtain a certain percentage of their electricity from renewable sources. To facilitate this transition, governments often offer incentives such as tax credits, subsidies, and feed-in tariffs to encourage the development of renewable energy projects.

These policies have a direct impact on the Overhead DC Electric Cable market because they drive the demand for cables that can efficiently transmit electricity generated from renewable sources like wind and solar farms to urban centers. As the renewable energy sector continues to grow, the need for high-capacity and long-distance transmission using Overhead DC Electric Cables becomes increasingly essential.

Grid Modernization Initiatives

Many governments are recognizing the need to modernize their electrical grids to enhance efficiency, reliability, and sustainability. Grid modernization initiatives involve

the upgrade or replacement of aging infrastructure with advanced technologies, including high-voltage direct current (HVDC) transmission systems that rely on Overhead DC Electric Cables.

To support these initiatives, governments allocate funding, establish regulatory frameworks, and incentivize utilities to invest in grid modernization projects. They recognize that modernizing the grid can improve energy efficiency, reduce transmission losses, and integrate renewable energy sources seamlessly.

The demand for Overhead DC Electric Cables is directly linked to these policies, as they are a fundamental component of HVDC systems used in grid modernization efforts. Governments play a pivotal role in shaping the direction of these projects, making it a crucial factor for cable manufacturers and the broader electrical industry.

Environmental Regulations and Emissions Reduction Targets

Governments worldwide are implementing stringent environmental regulations and emissions reduction targets to combat climate change and minimize air pollution. These policies often focus on reducing greenhouse gas emissions and transitioning to cleaner energy sources.

To achieve these goals, governments may impose emissions caps on power plants, promote the use of renewable energy, and encourage the electrification of transportation. All these measures necessitate an efficient power distribution system, which relies on Overhead DC Electric Cables for long-distance transmission of clean electricity.

As environmental regulations become more stringent, the demand for renewable energy and efficient electrical infrastructure increases, directly impacting the Overhead DC Electric Cable market. Cable manufacturers must comply with environmental standards, and the adoption of cleaner energy sources accelerates the deployment of DC transmission systems.

Trade and Tariff Policies

Trade and tariff policies can significantly influence the Overhead DC Electric Cable market, especially for cable manufacturers that operate in a global market. Government decisions on import/export tariffs, trade agreements, and trade restrictions can impact the cost and availability of materials and components used in cable manufacturing.

Trade policies may also affect the competitive landscape by promoting or hindering the entry of foreign cable manufacturers into domestic markets. Additionally, government incentives for local production can influence sourcing decisions for cable manufacturers.

Cable manufacturers must stay informed about trade and tariff policies in various regions to make informed business decisions, adapt to changing market dynamics, and remain competitive in a global market.

Infrastructure Investment and Economic Stimulus Packages

Government policies related to infrastructure investment and economic stimulus packages can have a direct impact on the Overhead DC Electric Cable market. During periods of economic downturn or as part of long-term development plans, governments often allocate substantial funds to infrastructure projects, including the expansion and upgrade of electrical grids.

These investments can lead to a surge in demand for Overhead DC Electric Cables, as they are a critical component of modernizing and expanding electrical infrastructure. As governments prioritize infrastructure development to create jobs and stimulate economic growth, cable manufacturers may experience increased orders and production.

For cable manufacturers, it is essential to monitor government infrastructure investment plans and engage with relevant authorities to secure contracts and ensure their products align with government specifications and standards.

Energy Security and Supply Reliability

Governments recognize the importance of energy security and supply reliability as critical components of national infrastructure. Policies aimed at ensuring a stable and resilient energy supply can have a significant impact on the Overhead DC Electric Cable market.

To enhance energy security, governments may invest in interconnectors and backup transmission infrastructure, which often rely on Overhead DC Electric Cables for efficient power transfer. These policies prioritize the development of redundant transmission networks to mitigate the risk of power disruptions caused by natural disasters, cyberattacks, or other unforeseen events.

In conclusion, government policies play a pivotal role in shaping the global Overhead DC Electric Cable market. Policies related to renewable energy, grid modernization, environmental regulations, trade, infrastructure investment, and energy security can significantly influence the demand for and adoption of Overhead DC Electric Cables. Cable manufacturers must closely monitor and adapt to these policies to navigate the evolving landscape of the global electrical infrastructure market successfully.

Key Market Challenges

Technological Advancements and Compatibility

One of the primary challenges in the global Overhead DC Electric Cable market is keeping up with the rapid pace of technological advancements and ensuring compatibility with existing infrastructure. As technology evolves, newer and more efficient cable designs and materials are continually being developed. While these innovations offer the promise of improved performance, efficiency, and cost-effectiveness, they also present challenges for cable manufacturers and grid operators.

Firstly, incorporating new technologies into existing grid infrastructure can be complex and costly. Grids are long-lived assets with decades-long lifecycles, and making changes to accommodate new cable technologies often requires extensive planning and investment. For example, upgrading an overhead AC transmission line to an HVDC line with advanced materials and insulation can be a complex undertaking, involving not only the cables themselves but also associated equipment and substations.

Secondly, ensuring compatibility between different generations of cables and equipment is crucial. Older cables may need to coexist with newer ones for years, necessitating standardization efforts and careful integration. Grid operators must also ensure that maintenance and repair protocols are consistent, regardless of cable age and technology.

Additionally, the global nature of the market means that compatibility challenges can vary by region. Different countries may adopt different cable technologies and standards, making it necessary to develop adaptable solutions that can function seamlessly in diverse environments.

Addressing these technological advancement and compatibility challenges requires collaboration between cable manufacturers, grid operators, and regulatory bodies.

Industry standards must evolve to accommodate new technologies and guidelines for retrofitting existing infrastructure should be developed to minimize disruptions and costs.

Environmental and Regulatory Concerns

The global Overhead DC Electric Cable market faces significant challenges related to environmental and regulatory concerns. As governments and societies worldwide prioritize sustainability and environmental protection, the cable industry must navigate a complex landscape of regulations and expectations.

One of the key environmental challenges is mitigating the impact of overhead DC cables on ecosystems and landscapes. The installation of transmission lines, particularly in ecologically sensitive areas, can raise concerns about habitat disruption, visual aesthetics, and potential harm to wildlife, including birds and other fauna.

To address these concerns, cable manufacturers and project developers often invest in environmental impact assessments and mitigation measures. This may involve burying cables underground to reduce visual impact, implementing bird-safe designs, and working closely with environmental agencies to ensure compliance with regulations.

Regulatory challenges are another critical issue. Governments worldwide enact regulations to ensure the safety, reliability, and performance of electrical infrastructure. Compliance with these regulations can be a complex and resource-intensive process, as different regions may have unique standards and requirements.

Furthermore, regulatory changes can impact the cost structure and competitiveness of cable manufacturers. For instance, stricter environmental regulations may require the adoption of more environmentally friendly materials or production processes, which can affect production costs.

Navigating these environmental and regulatory challenges requires a proactive and adaptive approach. Cable manufacturers must engage with regulatory authorities, environmental organizations, and local communities to address concerns and find solutions that strike a balance between meeting energy needs and protecting the environment. Developing and adhering to industry best practices for environmental impact assessment and mitigation is essential to gaining public trust and regulatory approval for new projects. Additionally, staying informed about evolving regulations and proactively adapting production processes can help cable manufacturers remain

compliant and competitive in the global market.

Segmental Insights

High voltage Insights

The High voltage segment held the largest market share in 2022 & expected to maintain it in the forecast period. HVDC (High Voltage Direct Current) cables are exceptionally efficient at transmitting electricity over extended distances. They experience lower resistive losses compared to medium and low voltage cables. This efficiency is crucial for transmitting electricity from remote power generation sources, such as offshore wind farms and remote solar installations, to urban centers where the demand is high.

Capacity for Bulk Power Transfer: HVDC cables have a higher power-carrying capacity compared to medium and low voltage cables. This makes them well-suited for projects involving the transfer of large volumes of electricity, such as cross-border power trading, interconnections between regions or countries, and the integration of massive renewable energy installations. Many governments and utilities are investing in grid modernization efforts, which often involve the deployment of HVDC transmission systems. These systems enhance grid stability, reduce energy losses, and allow for the efficient integration of renewable energy sources, which are typically located far from urban demand centers. HVDC cables are typically more cost-effective on a per-unit basis when considering the power capacity they can carry over long distances. This cost advantage becomes more pronounced for large-scale transmission projects, encouraging their use in mega-projects like transcontinental power links. The reduced energy losses associated with HVDC transmission contribute to a lower environmental footprint. Less wasted energy means fewer emissions and a more sustainable energy transmission system, aligning with global efforts to combat climate change. Ongoing advancements in HVDC cable technology, including the development of high-temperature superconductors and improved materials, continue to enhance their efficiency and performance. HVDC cables are essential for the integration of renewable energy into the grid, facilitating the transfer of clean energy from areas with abundant resources to regions with high electricity demand.

Conductor Insights

The Conductor segment held the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Conductors are at the core of any electric cable system, serving as the pathway for the flow of electrical current. In the case of Overhead DC Electric Cables, they are specifically designed to efficiently

transmit direct current (DC) over long distances. Their primary function is to carry electricity from the power generation source to end-users or substations. The conductor's material and design directly impact the efficiency of power transmission. High-quality conductors are engineered to minimize energy losses during transmission, ensuring that a significant portion of the electricity generated reaches its intended destination. The efficiency of conductors is particularly crucial for long-distance power transmission projects, such as those involving renewable energy sources located far from urban centers. Overhead DC Electric Cables come in various configurations, and the choice of conductor material and design can be tailored to meet specific project requirements. The flexibility in conductor selection allows for the optimization of performance, capacity, and efficiency based on factors like voltage requirements, distance, and environmental conditions. Ongoing research and development efforts continue to enhance conductor materials and designs, further improving their efficiency and performance. Innovations in conductor technology, such as the use of high-temperature superconductors, contribute to reducing energy losses during transmission, making them even more crucial in modern power infrastructure. Overhead DC Electric Cables are often used for high-voltage, long-distance transmission projects. High-voltage transmission lines require specialized conductors capable of withstanding high electrical stress and environmental conditions. This further underscores the importance of conductors in the overall system. Conductors are engineered for durability and reliability, ensuring consistent and safe power transmission. This reliability is critical for the stability of electrical grids and the delivery of electricity to homes, businesses, and industries. While conductors are a significant investment in any overhead DC electric cable project, they offer cost-effectiveness over the long term due to their efficiency in reducing energy losses. The economic advantages of using high-quality conductors align with the financial goals of power utilities and project developers.

.Regional Insights

Asia Pacific

Asia Pacific was the largest market for overhead DC electric cables, accounting for over 40% of the global market in 2022. The growth of the market in the region is driven by the increasing demand for renewable energy and the growing investment in new power infrastructure. Some of the key markets in the Asia Pacific region include China, India, Japan, and South Korea.

China is the largest market for overhead DC electric cables in the world. The growth of the market in China is driven by the increasing demand for renewable energy and the

growing investment in new power infrastructure. Some of the major players in the Chinese market include ABB, Prysmian Group, and NKT.

India is the second-largest market for overhead DC electric cables in the Asia Pacific region. The growth of the market in India is driven by the increasing demand for renewable energy and the growing investment in new power infrastructure. Some of the major players in the Indian market include ABB, Prysmian Group, and LS Cable & System.

North America

North America was the second-largest market for overhead DC electric cables, accounting for over 30% of the global market in 2022. The growth of the market in the region is driven by the increasing demand for the interconnection of power grids and the growing investment in offshore wind power. Some of the key markets in the North America region include the United States and Canada.

The United States is the largest market for overhead DC electric cables in the North America region. The growth of the market in the United States is driven by the increasing demand for interconnection of power grids and the growing investment in offshore wind power. Some of the major players in the US market include ABB, Prysmian Group, and NKT.

Europe

Europe was the third-largest market for overhead DC electric cables, accounting for over 20% of the global market in 2022. The growth of the market in the region is driven by the increasing demand for renewable energy and the growing investment in the interconnection of power grids. Some of the key markets in the Europe region include Germany, the United Kingdom, France, and Italy.

Germany is the largest market for overhead DC electric cables in the Europe region. The growth of the market in Germany is driven by the increasing demand for renewable energy and the growing investment in the interconnection of power grids. Some of the major players in the German market include ABB, Prysmian Group, and Siemens.

Key Market Players

ABB Ltd

Prysmian Group

NKT A/S

Nexans S.A.

Siemens AG

Hitachi, Ltd.

LS Cable & System Ltd.

Southwire Company

Sumitomo Electric Industries, Ltd.

Mitsubishi Electric Corporation

Report Scope:

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

Overhead DC Electric Cable Market, By Voltage Rating:

High voltage

Medium voltage

Low voltage

Overhead DC Electric Cable Market, By Component:

Conductor

Insulators

Fittings & Accessories

Overhead DC Electric Cable Market, By End User:

Utilities & Power Grids

IT & Telecom

Automotive & Transportation

Electronics

Overhead DC Electric 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 Overhead DC Electric Cable Market.

Available Customizations:

Global Overhead DC Electric 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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