

Submarine DC Electric Cable Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (High-Voltage Direct Current, Extra-High-Voltage Direct Current), By Application (Offshore Wind Power Generation, Inter-Country & Island Power Connections, Others), By Region, By Competition, 2018-2028

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Abstracts

Global Submarine DC Electric Cable Market was valued at USD 22.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 9.19% through 2028.

The global submarine DC electric cable market refers to the industry segment dedicated to the design, manufacturing, installation, and maintenance of specialized electrical cables intended for underwater use. These cables are specifically engineered to transmit direct current (DC) electrical power between various points beneath the sea, often across significant distances. They play a crucial role in facilitating the transmission of electricity for a diverse range of applications, including offshore renewable energy generation (such as offshore wind farms), interconnection of power grids between countries or regions, and powering subsea oil and gas exploration and production activities.

The market encompasses a broad spectrum of participants, including cable manufacturers, energy companies, infrastructure developers, and technology innovators. Key drivers of this market include the increasing global demand for clean energy, the need for cross-border energy exchange, and the growth of offshore industries. Challenges include environmental impact concerns, strict regulatory

compliance, and the high cost of manufacturing, installation, and maintenance. The submarine DC electric cable market is characterized by ongoing technological advancements aimed at enhancing cable performance, durability, and efficiency, as well as a growing emphasis on sustainability and environmental responsibility.

Key Market Drivers

Expanding Renewable Energy Infrastructure

One of the key drivers propelling the global submarine DC electric cable market is the rapid expansion of renewable energy infrastructure, particularly offshore wind farms. As nations around the world strive to reduce their carbon footprint and transition to cleaner energy sources, offshore wind has emerged as a significant contributor to this goal. Submarine DC electric cables are essential for transmitting electricity generated by offshore wind turbines to the mainland power grid.

Offshore wind farms are being constructed in various regions, including the North Sea, the Baltic Sea, the Atlantic Ocean, and many others. These offshore installations require extensive cabling systems to transport the electricity efficiently and reliably to onshore substations. Submarine DC cables, with their low transmission losses and high voltage capacity, are the preferred choice for this purpose. This driver is expected to continue fueling the demand for submarine DC electric cables in the coming years.

Interconnectivity and Cross-Border Energy Trade

The global trend towards interconnectivity and cross-border energy trade is another significant driver in the submarine DC electric cable market. As countries seek to diversify their energy sources and ensure energy security, interconnecting their power grids through submarine cables becomes increasingly important.

These interconnections allow for the exchange of electricity between neighboring nations, optimizing energy resources, and providing backup during shortages or emergencies. Submarine DC cables are well-suited for this purpose due to their high voltage capacity and ability to transmit electricity over long distances with minimal losses. As countries across Europe, Asia, and other regions work on grid interconnections, the demand for submarine DC electric cables will continue to rise.

Growing Demand for Data Centers and Submarine Fiber Optic Cables

The growing demand for data centers and the expansion of submarine fiber optic cables are indirectly driving the submarine DC electric cable market. Data centers require reliable power sources, and many of them are located in proximity to coastal areas. Submarine DC electric cables are often used to provide backup power to these critical facilities, ensuring uninterrupted data processing and storage.

Moreover, the expansion of submarine fiber optic cables, which are vital for global data communication, often goes hand-in-hand with submarine DC electric cables. These fiber optic cables require power for their amplification and transmission equipment, and submarine DC cables provide a convenient and efficient means of supplying this power underwater. As the data center and submarine fiber optic cable industries grow, they will contribute to the demand for submarine DC electric cables.

Aging Infrastructure Replacement

Aging submarine electric cable infrastructure is a driver that is gradually gaining prominence in the market. Many submarine cables laid decades ago are reaching the end of their operational life, necessitating replacement. This presents an opportunity for cable manufacturers to supply modern, high-capacity submarine DC electric cables that offer improved performance, durability, and efficiency.

Utilities and cable operators are investing in the replacement of these older cables with more advanced technologies to enhance grid reliability and transmission capacity. This driver, while not as rapid as some others, contributes to the sustained demand for submarine DC electric cables as part of infrastructure modernization efforts.

Offshore Oil and Gas Exploration and Production

The offshore oil and gas industry remains a substantial driver for the submarine DC electric cable market. Submarine cables are essential for powering offshore drilling platforms, subsea production equipment, and underwater communication systems. As offshore exploration and production activities continue in various regions, the demand for reliable and efficient submarine DC electric cables to support these operations remains robust.

The offshore energy industry is also witnessing a transition toward cleaner energy solutions, such as electrification of offshore platforms and subsea power distribution. Submarine DC electric cables are integral to these efforts, facilitating the transmission of electricity from shore-based power generation facilities to offshore installations. This

shift further strengthens the role of submarine DC cables in the offshore energy sector.

Government Initiatives and Regulations

Government initiatives and regulations promoting renewable energy, grid integration, and energy security play a pivotal role in driving the submarine DC electric cable market. Many governments worldwide are actively encouraging the development of offshore wind farms, grid interconnections, and the transition to cleaner energy sources.

To achieve these objectives, governments often provide financial incentives, subsidies, and regulatory support to companies involved in submarine cable projects. These initiatives not only stimulate market demand but also ensure that submarine DC electric cables meet stringent quality and safety standards. As governments continue to prioritize sustainable energy and grid development, the submarine DC electric cable market will see sustained growth.

In conclusion, the global submarine DC electric cable market is influenced by a combination of factors, including the expansion of renewable energy infrastructure, grid interconnectivity, data center growth, infrastructure replacement, offshore energy activities, and government initiatives. These drivers collectively contribute to a positive outlook for the industry, driving innovation and investment in submarine cable technology. As the world's energy landscape continues to evolve, submarine DC electric cables will remain a crucial component in enabling efficient and sustainable energy transmission both onshore and offshore.

Government Policies are Likely to Propel the Market

Offshore Wind Energy Development Initiatives

Governments around the world have been implementing policies to support the development of offshore wind energy projects, a key driver of the submarine DC electric cable market. These initiatives aim to reduce greenhouse gas emissions, enhance energy security, and create jobs. Such policies encompass a range of measures, including financial incentives, regulatory frameworks, and strategic planning.

One notable example is the United Kingdom's Offshore Wind Sector Deal, which sets ambitious targets for offshore wind capacity and investment. Under this policy, the UK government commits to supporting the growth of the offshore wind industry by providing financial backing and streamlining regulatory processes. Similar initiatives can be

observed in other countries, such as the United States, Germany, and China, where governments are actively promoting offshore wind projects and, consequently, the demand for submarine DC electric cables.

Grid Integration and Cross-Border Interconnectivity

Grid integration and cross-border interconnectivity policies are instrumental in fostering the growth of the submarine DC electric cable market. Governments recognize the importance of interconnected power grids for energy security, resource optimization, and emergency response. As such, they implement policies to encourage cross-border energy trade and the establishment of submarine cable links.

For instance, the European Union's Energy Union initiative aims to create a single European electricity market, facilitated by the development of interconnections between member states. These interconnections require submarine DC cables to transmit electricity efficiently across national borders. Government support in the form of funding and regulatory coordination is crucial to the success of such initiatives.

Renewable Energy Targets and Incentives

Many governments have set renewable energy targets and incentives to encourage the adoption of cleaner energy sources, including offshore wind, which heavily relies on submarine DC electric cables for power transmission. These targets often involve a mix of regulatory mandates, financial incentives, and market mechanisms to stimulate investment in renewable energy projects.

One illustrative case is Denmark's ambitious plan to be carbon-neutral by 2050, which includes substantial wind energy development in the North Sea. The Danish government offers various incentives, such as feed-in tariffs and tax benefits, to attract investments in offshore wind farms and associated submarine cable infrastructure. Similar policies exist in countries like the Netherlands, Sweden, and Taiwan, driving demand for submarine DC electric cables in the renewable energy sector.

Environmental Regulations and Permitting Processes

Environmental regulations and permitting processes are critical aspects of government policies that impact the submarine DC electric cable market. Due to the ecological sensitivity of underwater environments, governments implement stringent environmental protection measures and permitting requirements for submarine cable installations.

For example, the U.S. National Environmental Policy Act (NEPA) mandates environmental impact assessments for submarine cable projects in American waters. Similarly, the EU's Marine Strategy Framework Directive establishes guidelines for the protection of marine ecosystems. Compliance with these regulations necessitates significant investments in cable design, installation techniques, and environmental monitoring, shaping the market's landscape.

Investment in Research and Development

Government policies often include provisions for research and development (R&D) funding to advance submarine cable technology. R&D investments support innovation in cable design, materials, and manufacturing processes, contributing to improved performance, reliability, and efficiency.

Governments may collaborate with industry stakeholders to establish R&D programs. For instance, the United States Department of Energy (DOE) funds research projects related to offshore wind technologies, including the development of advanced submarine DC electric cables. These investments drive technological advancements that benefit the submarine cable market by enabling higher voltage capacities, longer transmission distances, and greater resistance to environmental stressors.

National Security and Resilience Measures

Governments also enact policies related to national security and resilience, which impact the submarine DC electric cable market, especially in regions with critical energy infrastructure. These policies aim to safeguard the integrity of submarine cable networks and ensure they remain operational during emergencies or disruptions.

For instance, the United States has established regulations to protect submarine cable landing sites and requires companies to implement security measures to prevent sabotage or unauthorized access. Such measures enhance the resilience of submarine cable systems, reassuring investors and stakeholders of their reliability.

In conclusion, government policies play a crucial role in shaping the global submarine DC electric cable market. Policies promoting offshore wind energy, grid integration, renewable energy targets, environmental protection, R&D, and national security all contribute to the industry's growth and development. As governments worldwide continue to prioritize sustainable energy and infrastructure, these policies will continue

to influence the submarine DC electric cable market's evolution and expansion.

Key Market Challenges

Environmental Impact and Regulatory Compliance

The submarine DC electric cable market faces a substantial challenge concerning its environmental impact and the rigorous regulatory compliance required for underwater cable installations. The installation and operation of submarine DC electric cables can have adverse effects on marine ecosystems, and governments worldwide have imposed strict environmental regulations and permitting processes to mitigate these impacts.

One of the primary environmental concerns associated with submarine cable installations is the physical disruption caused during the cable laying process. This disruption can damage fragile seabed habitats, disrupt marine ecosystems, and harm aquatic species. Additionally, the electromagnetic fields generated by submarine power cables can affect marine organisms' behavior and navigation.

To address these concerns, governments have implemented regulations and environmental impact assessment (EIA) requirements that cable developers must adhere to. For example, the United States enforces the National Environmental Policy Act (NEPA), which mandates comprehensive EIAs for submarine cable projects in U.S. waters. Similarly, the European Union has directives like the Environmental Impact Assessment Directive and the Habitats Directive that govern cable installations in European waters.

Complying with these regulations and obtaining the necessary permits can be a time-consuming and costly process. Cable developers must invest in extensive environmental studies, collaborate with marine scientists, and implement mitigation measures to minimize their projects' impact on the environment. These measures may include using specialized installation techniques, selecting environmentally friendly cable materials, and conducting ongoing environmental monitoring.

Moreover, the permitting process can introduce delays and uncertainties into submarine cable projects, affecting project timelines and budgets. Lengthy permitting procedures can result in cost overruns, making cable projects less attractive to investors. The challenge lies in balancing the need for robust environmental protection with the imperative of advancing submarine DC electric cable infrastructure to meet growing

energy demands and renewable energy goals.

Addressing the environmental impact and regulatory compliance challenge requires collaboration among governments, cable manufacturers, environmental organizations, and scientific communities. The development and implementation of innovative technologies, such as cable burial techniques that minimize seabed disturbance and mitigation strategies to reduce electromagnetic field effects, are essential to mitigating the environmental impact of submarine DC electric cables. Striking a balance between environmental stewardship and infrastructure development remains a key challenge for the industry.

Cost and Technological Advancements

The cost of manufacturing, installing, and maintaining submarine DC electric cables is a significant challenge for the global market. While these cables are essential for various applications, including offshore wind power transmission, interconnection of power grids, and offshore oil and gas operations, the high costs associated with their development and deployment can pose barriers to market growth.

One of the primary cost factors is the complexity of manufacturing submarine DC electric cables. These cables must meet stringent technical requirements, including high voltage capacity, resistance to environmental stresses such as seawater corrosion and temperature variations, and the ability to transmit electricity over long distances with minimal losses. Achieving these specifications necessitates the use of specialized materials and manufacturing processes, which can be costly.

Installation costs also contribute significantly to the overall expense. Laying submarine cables on the seabed or burying them beneath it requires specialized vessels, equipment, and skilled personnel. The challenges posed by deep-sea installations, challenging marine conditions, and navigating international waters further increase installation expenses.

Furthermore, the maintenance and repair of submarine DC electric cables can be costly and logistically challenging. Regular inspections and maintenance are essential to ensure the cables' integrity and reliability over their operational lifespan, which can extend for several decades. Repairing or replacing damaged cables in remote underwater locations can incur substantial costs and downtime.

To address these cost challenges, the submarine DC electric cable industry must

continue to invest in research and development to identify cost-effective materials, manufacturing processes, and installation technologies. Technological advancements, such as the development of more durable and efficient cable materials and innovative installation methods, can help reduce costs over time.

Another approach to mitigating cost challenges involves increasing competition within the industry. Encouraging multiple suppliers and fostering a competitive market can drive down prices and lead to more cost-efficient solutions.

Additionally, governments can play a role in cost reduction by providing financial incentives, grants, or subsidies to support cable projects with a strong public interest, such as those enabling renewable energy generation or enhancing grid resilience.

In conclusion, the global submarine DC electric cable market faces challenges related to the environmental impact and regulatory compliance of cable installations, as well as the high costs associated with manufacturing, installation, and maintenance. Addressing these challenges requires collaboration among industry stakeholders, governments, and environmental organizations, along with ongoing investments in technology and innovation to develop more cost-effective and environmentally friendly solutions. Finding a balance between environmental responsibility and affordability will be crucial for the industry's sustainable growth and success.

Segmental Insights

High-Voltage Direct Current Insights

The High-Voltage Direct Current (HVDC) segment held the largest market share in 2022 & expected to maintain it in the forecast period. HVDC cables are known for their efficiency over long transmission distances. Unlike Alternating Current (AC), DC transmission experiences lower power losses, especially over extended undersea routes. This makes HVDC cables particularly suitable for interconnecting power grids across international borders or for transmitting electricity from remote offshore wind farms to the mainland. HVDC systems provide better control over voltage levels, which is crucial for maintaining stable power transmission over varying distances and under different load conditions. This control is especially important when dealing with the challenges of transmitting electricity through submarine cables. AC transmission systems can suffer from reactive power losses, which can result in higher energy consumption. HVDC transmission minimizes these losses, leading to more efficient energy transmission. HVDC systems are not affected by issues related to the

synchronization of frequencies between interconnected grids, making them ideal for interconnecting grids with varying AC frequencies. HVDC cables generate lower levels of electromagnetic interference compared to their AC counterparts. This reduced interference is crucial for sensitive electronic equipment and systems. HVDC systems have a higher load transfer capability, allowing them to transmit larger amounts of power, which is vital for high-demand areas or when connecting major power generation sources like offshore wind farms. In some cases, HVDC cables are preferred for their reduced environmental impact. They typically require narrower cable corridors and have a smaller footprint on the seabed compared to AC cables. Ongoing advancements in HVDC technology, such as the development of voltage-source converters (VSC), have improved the performance and efficiency of HVDC systems. These advancements have further solidified the dominance of HVDC in certain submarine cable projects.

Offshore Wind Power Generation Insights

The Offshore Wind Power Generation segment held the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Offshore wind power generation has experienced exponential growth in recent years. Many countries are increasingly investing in offshore wind projects as a key component of their renewable energy strategies. These projects are often located far from the coast, necessitating the use of submarine DC electric cables to transmit the electricity generated by offshore wind turbines to the mainland. Global efforts to reduce carbon emissions and combat climate change have led to a significant shift toward renewable energy sources. Offshore wind is considered a reliable and sustainable energy solution, and governments and energy companies worldwide are expanding their offshore wind portfolios. Submarine DC cables are essential for connecting these wind farms to onshore grids, making them a critical component of the offshore wind energy supply chain. Offshore wind farms are often situated in locations where the electricity generated needs to be transmitted over long distances to reach population centers. Submarine DC electric cables, particularly high-voltage DC (HVDC) cables, excel in efficiently transmitting electricity over extended undersea routes with minimal power losses. This capability is vital for transporting large quantities of electricity from offshore wind farms to onshore substations. Ongoing technological advancements in submarine DC cable technology, including the development of materials, manufacturing techniques, and installation methods, have made these cables more efficient and cost-effective. This has further facilitated their use in offshore wind power transmission projects. Many governments have implemented policies and incentives to promote offshore wind energy development. These policies include financial incentives, feed-in tariffs, and streamlined permitting processes. Such support not only fosters the growth

of offshore wind projects but also encourages the demand for submarine DC electric cables. Offshore wind power contributes to energy security by diversifying energy sources and reducing reliance on traditional fossil fuels. Additionally, it enables the decentralization of energy generation, allowing power generation to be located closer to areas of demand, which requires efficient submarine cable connections.

Regional Insights

North America

The submarine DC electric cable market in North America is expected to grow at a CAGR of 7.5% during the forecast period 2023-2028. The growth of the market in North America is attributed to the increasing demand for offshore wind power generation and inter-country power connections.

Some of the major submarine DC electric cable projects in North America include:

Atlantic Link: This project is a proposed 1,200 MW submarine DC electric cable that will connect New York and Nova Scotia, Canada.

New England Clean Energy Connect: This project is a proposed 1,200 MW submarine DC electric cable that will connect Maine and Massachusetts.

Cook Inlet Hydrocarbon Submarine Cable: This project is a proposed 75 MW submarine DC electric cable that will connect the Cook Inlet natural gas field in Alaska to the mainland.

Europe

The submarine DC electric cable market in Europe is expected to grow at a CAGR of 8.3% during the forecast period 2023-2028. The growth of the market in Europe is attributed to the increasing demand for offshore wind power generation and inter-country power connections.

Some of the major submarine DC electric cable projects in Europe include:

North Sea Link: This project is a 1,400 MW submarine DC electric cable that connects Norway and the United Kingdom.

NORMAN Link: This project is a 450 MW submarine DC electric cable that connects Norway and Germany.

BritNed: This project is a 1,000 MW submarine DC electric cable that connects the United Kingdom and the Netherlands.

Asia Pacific

The Asia Pacific region is the largest market for submarine DC electric cables, followed by Europe and North America. The growth of the market in the Asia Pacific region is attributed to the increasing demand for renewable energy and inter-country power connections.

Some of the major submarine DC electric cable projects in the Asia Pacific region include:

Xiluodu-Zhejiang UHVDC Transmission Project: This project is a 5,000 MW submarine DC electric cable that connects the Xiluodu Hydropower Station in Sichuan Province, China to Zhejiang Province, China.

SG Cable: This project is a 2,000 MW submarine DC electric cable that will connect Singapore and Indonesia.

Eastern Link: This project is a 1,000 MW submarine DC electric cable that will connect Hong Kong and Guangdong Province, China.

Key Market Players

NKT A/S

Prysmian Group

Nexans S.A.

Sumitomo Electric Industries Ltd.

LS Cable & System Ltd.

Hitachi Power Grids

ABB Ltd.

General Cable Technologies Corporation

Siemens Energy AG

Draka Cable International B.V.

Report Scope:

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

Submarine DC Electric Cable Market, By Type:

High-Voltage Direct Current

Extra-High-Voltage Direct Current

Submarine DC Electric Cable Market, By Application:

Offshore Wind Power Generation

Inter-Country & Island Power Connections

Others

Submarine 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 Submarine DC Electric Cable Market.

Available Customizations:

Global Submarine 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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13.9.1. Business Overview

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13.9.3. Recent Developments

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13.10.1. Business Overview

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14. STRATEGIC RECOMMENDATIONS

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