

Surge Arresters Market – Global Industry Size, Share, Trends, Opportunity, and Forecast Segmented By Type (Porcelain and Polymeric), By Voltage Level (Station Class, Intermediate Class and Distribution Class), By Application (High, Medium and Low), By Application (Utility and Industrial), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Submarine Power Cable Market was valued at USD 10.06 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 11.64% through 2028. The market growth is primarily driven by key factors such as substantial investments in offshore wind farms, escalating data traffic, and investments by OTT providers to meet the growing requirements. Submarine cables are extensively utilized for power and communication applications, including power transmission to oil rigs, connecting offshore wind farms to power stations, inter-country connections, and island connections. The increasing demand for interconnecting power grids between countries remains a significant driver for low-power cable demand.

Key Market Drivers

Offshore Wind Energy Expansion

One of the key catalysts for the global submarine power cable market is the rapid expansion of offshore wind energy projects worldwide. Offshore wind farms are increasingly being developed to harness the strong and consistent winds available at sea, thus providing a clean and renewable source of electricity.

Submarine power cables play a crucial role in these projects by connecting offshore wind turbines to onshore substations and the wider electricity grid. The global shift towards cleaner energy sources and the pressing need to reduce greenhouse gas emissions have significantly accelerated the growth of offshore wind energy. Many countries have set ambitious renewable energy targets, with offshore wind power playing a pivotal role in achieving these objectives. Consequently, the demand for submarine power cables is experiencing a significant surge, becoming a critical driver of the submarine power cable market's growth.

Designing these submarine cables to withstand challenging marine conditions, including saltwater exposure and dynamic seabed environments, is of paramount importance. Technological advancements in cable design and improved insulation materials are playing a pivotal role in ensuring the reliability and longevity of these vital connections.

Interconnection Projects and Cross-Border Electricity Trade

The increasing number of cross-border electricity interconnection projects serves as a significant driver. These projects entail the installation of submarine power cables to link the electrical grids of neighboring countries. Cross-border interconnectors play a vital role in promoting energy security, grid stability, and the efficient utilization of renewable energy resources.

As nations strive to achieve a balanced energy portfolio and gain access to diverse sources of electricity, cross-border electricity trade has emerged as a strategic imperative. Submarine power cables are crucial in facilitating this trade, enabling surplus electricity from one country to be exported to neighboring regions with higher demand. This contributes to mitigating energy shortages, optimizing electricity generation, and enhancing energy security.

Moreover, interconnection projects can facilitate the integration of intermittent renewable energy sources like wind and solar into the grid. Excess renewable energy generated during favorable weather conditions can be exported to neighboring regions, reducing curtailment and maximizing the utilization of clean energy.

Grid Modernization and Renewable Energy Integration

The third crucial factor driving the global submarine power cable market is the ongoing modernization of electrical grids to accommodate the integration of renewable energy sources. Traditional power grids are transforming into smart grids capable of efficiently

managing the variable nature of renewable energy generation.

Submarine power cables play a pivotal role in connecting offshore renewable energy installations, including offshore wind farms and tidal energy projects, to the grid. These connections enable the seamless flow of clean electricity into the existing grid infrastructure.

As governments and utilities worldwide strive to reduce their reliance on fossil fuels and increase the share of renewables in their energy mix, the demand for submarine power cables is growing. These cables support the reliable and stable integration of renewable energy into the grid, making them indispensable for achieving renewable energy targets and reducing carbon emissions.

In conclusion, the global submarine power cable market is propelled by the rapid expansion of offshore wind energy, the proliferation of cross-border interconnection projects, and the imperative of grid modernization to effectively integrate renewable energy. As the world transitions towards cleaner and more sustainable energy systems, submarine power cables will continue to play a pivotal role in facilitating the transmission of renewable electricity and promoting a greener energy future.

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.

To address these challenges, cable manufacturers and project developers are

dedicating resources to research and development, with the goal of creating more environmentally friendly cable designs and installation methods. Innovations in cable materials and burial techniques are being pursued to minimize the environmental footprint of submarine power cable projects.

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

Increasing Demand for Renewable Energy Integration

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 market in the Global 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 Submarine Power Cable Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Submarine Power Cable Market, By Type:

Single Core

Multicore

Submarine Power Cable Market, By Voltage:

Medium Voltage

High Voltage

Submarine Power Cable Market, By End User:

Offshore Wind Power Generation

Inter-Country & Island Connection

Submarine Power 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

Competitive Landscape

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

Available Customizations:

Global 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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