

Underground Cables Market in India

Market Trends, Outlook and Opportunities

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Executive Summary

With the growing demand for power in urban areas and industries, underground cable systems are becoming an increasingly indispensable part of power transmission and distribution systems. With improved technologies and increased reliability, the cost differential between underground cables and overhead power lines is narrowing and utilities are acknowledging the benefits associated with underground cabling. This report will attempt to take a look at the key trends in the deployment of underground cables so far; analyse the plans and proposal of T&D utilities; examine new and evolving technology improvements and solutions being offered by the industry; as well as assess the key issues and challenges.

1. T&D Industry Overview

The T&D industry has been growing steadily with investments being made in system strengthening and capacity additions. This chapter will attempt to give an overview of the T&D industry and will focus on:

- ❖ Growth and Size of Existing T&D Networks
- ❖ Recent T&D Network Additions
- ❖ Projected T&D Network Additions
- ❖ Projected Capex (till 2022-23)
- ❖ Future Outlook
- ❖ Issues and Challenges

2. Market Size and Growth for Under Ground Cables

Most of India's T&D network continues to be strung overhead across the country; however, concerns about reliability and quality of supply are making utilities gradually replace their networks with underground lines. This chapter will give an overview on the new and emerging utility requirements in the underground cabling segment and will cover the following:

- ❖ Experience so far in T&D Networks
- ❖ Emerging Utility Requirements
 - Transmission
 - Distribution
- ❖ Major Projects Commissioned
 - Transmission
 - Distribution
- ❖ Major Projects Awarded/Under Construction
 - Transmission
 - Distribution
- ❖ Key Recent Tenders
- ❖ Issues and Challenges

3. Recent Trends and Advances

Well-designed and well-installed underground cable systems are expected to have a service life of 30-40 years. Utility providers, transmission companies and cable manufacturers are hence, looking for new technologies and solutions to respond to new grid challenges. This chapter will look at the new and promising technologies, designs and solutions for underground cable networks.

- ❖ Design, Laying and Construction Processes
- ❖ Product and Technology Trends

- ❖ Market Trends and Developments (JVs/Acquisitions/ Partnership Deals)
- ❖ Pricing and Cost Trends

4. Opportunities under Key Central/State Government Programmes

Underground cables are an important part of several central government initiatives for improving T&D networks under IPDS. This chapter will attempt to provide the details of plans and targets of works proposed to be taken up under various schemes.

- ❖ Snapshot of Key Government Programmes (IPDS, Green Energy Corridors, State Government Initiatives, etc.)
- ❖ Physical Targets for UG Cabling Works
- ❖ Funding Availability for UG Cabling Projects
- ❖ Issues and Concerns

5. Opportunities under Smart Cities Mission

The Smart Cities Mission offers significant opportunities for underground cabling in key cities. Some cities such as Indore, Belagavi, Dharamshala, Lucknow, Kanpur and Tirupati are implementing projects for setting up underground cabling network for utilities such as electric wires, water pipelines, stormwater drains, sewers and telecommunication cables. This chapter will attempt to provide the details of plans and targets of works proposed to be taken up under various schemes.

- ❖ Snapshot of the Mission
- ❖ Physical Targets for UG Cabling Works
- ❖ Projects Completed so Far in Key Cities
- ❖ Projects Under Construction/ Awarded
- ❖ Proposed Projects
- ❖ Issues and concerns

6. Outlook and Projections (till 2022)

This chapter will give a snapshot of the investments and physical targets proposed for underground cabling networks by transcos and discoms. The information presented in this chapter will be based on both primary and secondary information collected from transcos and discoms.

- ❖ Growth Drivers for UG Cabling
- ❖ Expected Demand for UG Cables
- ❖ Plans and Targets of Utilities by Segment
 - Transmission
 - Distribution
- ❖ Budgeted Capital Expenditures on UG Cabling
- ❖ Future Outlook

7. Leading Players

This chapter will primarily focus on the profiles of key vendors and technology providers for underground cabling. Each profile will cover the following information:

- ❖ Brief Company Overview
- ❖ Key Product Offerings
- ❖ Existing Manufacturing Capacity
- ❖ Financial Performance
- ❖ Future Plans

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