

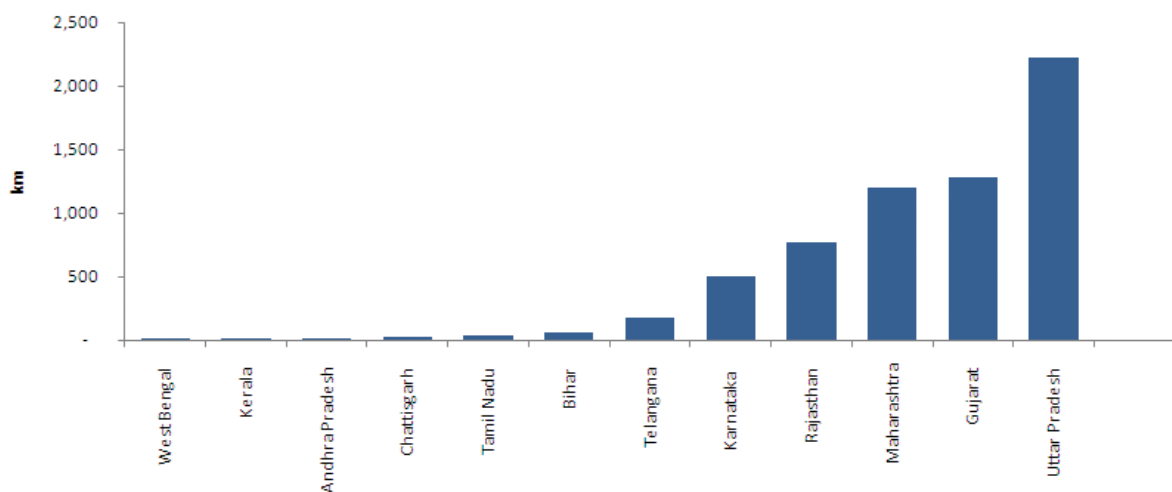
Underground Cables Market in India

Market Trends, Outlook and Opportunities

Key Takeaways

- The growing power demand in the country has resulted in rapid expansion of power distribution and transmission network over the years. Besides, the utilities have been adopting newer technology solutions and advanced techniques to enhance network efficiency as well as to expand the T&D network in densely populated and forest areas.
- In power distribution segment, the underground cabling plays a crucial role in providing 24X7 quality and reliable power supply. It offers a host of benefits such as resilience against severe weather conditions, ease of network expansion in densely populated areas, and protection against theft. The underground cabling works by the distribution utilities are primarily being done under the union government's flagship scheme for network strengthening - Integrated Power Development Scheme.
- Meanwhile, underground cabling is also important for network expansion in the power transmission segment since underground cables entail minimum right-of-way and require fewer clearances.
- In terms of project cost, undoubtedly, the underground power cabling system is an expensive choice. However, demand for underground cables is expected to be primarily based on reliable supply, safety consideration, esthetic value, clearance available, rules and regulations in force and other factors.

State-wise Progress for Underground Cabling under IPDS



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

- ❖ Size and Growth 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 Underground cables

- ❖ 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

- ❖ Design, Laying and Construction Processes
- ❖ Product and Technology Trends
- ❖ Market Trends and Developments
- ❖ Pricing and Cost Trends

4. Opportunities under Key Central/State Government Programmes

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

5. Opportunities under Smart Cities Mission

- ❖ Snapshot of the Mission
- ❖ Recently Completed Projects
- ❖ Projects Under Construction
- ❖ Proposed Projects
- ❖ Under Bidding Projects
- ❖ Issues and concerns

6. Outlook and Projections

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

7. Leading Players

- ❖ KEI Industries Limited
- ❖ Havells India Limited
- ❖ Finolex Cables Limited
- ❖ KEC International Limited
- ❖ Sterlite Power Transmission Limited
- ❖ Gupta Power Infrastructure Limited
- ❖ Hindusthan Urban Infrastructure Limited
- ❖ V-Guard Industries Limited
- ❖ Apar Industries Limited
- ❖ Universal Cables Limited
- ❖ Delton Cables Limited
- ❖ Polycab Wires Private Limited
- ❖ Transrail Lighting Limited
- ❖ RR Kabel Limited
- ❖ Cable Corporation of India
- ❖ Teracom Limited
- ❖ Smita Conductors Private Limited
- ❖ LS Cable India Private Limited
- ❖ Nexans S.A.
- ❖ Brugg Kabel AG
- ❖ ZTT International Limited

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Contact details:

Sumita Kanjilal

Information Products
 India Infrastructure Publishing Pvt. Ltd.
 B-17, Qutab Institutional Area, New Delhi 110016, India
 Tel: +91-11-46560421, 41034600, 41034601
 Fax: +91-11-26531196
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 Email: sumita.kanjilal@indiainfrastructure.com