

Europe Cable Management Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Europe Cable Management Market is estimated to register a CAGR of approximately 6.09% during the forecast period. With the increased deployment of cables across several industries in Europe, the demand for cable management solutions is also rising. For instance, according to the Office of Communications (United Kingdom), the number of fixed cable broadband connections in the United Kingdom increased from 5.08 million in 2019 to 5.36 million in 2021.

Key Highlights

Additionally, Greece is embarking on one of Europe's most ambitious energy projects by linking its electricity grid with Egypt. In September 2022, Copelouzos Group announced the undertaking of a project whose management recently met with the Egyptian leaders to speed up the process. As a part of this project, an underwater cable, running directly from northern Egypt to Attica in Greece, will carry 3,000 MW of electricity, enough to power up to 450,000 households.

Further, in July 2022, a US communications infrastructure provider launched the Zeus subsea route connecting the United Kingdom and continental Europe as cloud service providers look forward to a faster internet connection. Undersea cables transmit most of the world's internet data traffic, and numerous technology companies, including Alphabet's Google and Meta, have also invested in building their subsea cables.

In September 2021, through outlining plans to take a prominent role in the US-to-Europe connectivity route, Orange announced that it landed the Amitie submarine telecommunications cable on a beach in the commune of Le Porge, near Bordeaux, France. Orange is a partner in this 6,800km cable project, connecting the US states of Massachusetts, Le Porge, and Bude in the United Kingdom. Orange claimed it would benefit from two pairs of fiber-optic cables as part of the new network system, offering up to 23Tbps each.

Furthermore, various companies in different regions have been bolstering their IT strategy. For instance, in November 2021, UK operator BT Group opened a robotic research facility that developed robotic solutions for telecom and civil engineering to speed

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up fiber deployments. Such instances are expected to drive the market growth over the forecast period. The COVID-19 crisis accelerated the demand for applying technology to create a better and more efficient society in many countries. Additionally, deploying high-capacity networks has resulted in complicated cable installations across various verticals. Thus, the need to manage the cables has gained prominence, driving the growth of the cable management market in Europe.

Europe Cable Management Market Trends

IT and Telecom Industry to drive the market

Telecom cables play a significant role in transmitting data from one location to another by sending light pulses. These cables, popularly known as optical fiber cables, are made of fibers (threads) or plastic (glass). The pack of glass threads transmits the modulated messages over light waves. The plastic or glass technique transmits the data quickly and effectively using copper cables. Telecommunication cable manufacturers produce bandwidth cables that are less vulnerable than metal cables to interference, lighter, less thin, and through which data can be transmitted digitally. The increasing demand for fiber optic connections among the general public in Europe is driven by the growing need for bandwidth, as more and more devices are connected to the internet.

The European Union has taken several crucial steps to boost connectivity in several areas. It successfully eliminated roaming fees, allowing consumers to use mobile subscriptions throughout the region. The WiFi4EU initiative significantly helped local communities set up free Wi-Fi hotspots. The EU also offers to finance, develops technical guidelines, and brings specialists to support governments and enterprises in improving network coverage and implementing 5G networks across Europe.

In September 2021, BT Group, the UK's prominent mobile and broadband operator, preferred Oracle Communications Cloud-Native Converged Policy Management to optimize the overall network resources and accelerate the introduction of new 5G capabilities. The solution will enable BT to quickly and easily test and deploy 5G services across its EE mobile network, including live streaming and zero-rated 5G content.

The EU is also funding 11 new technology and trial projects to enable 5G ecosystems in Europe. These include eight new projects that aim to build a first-class European supply chain for 5G hardware. The 5G Action Plan for Europe (5GAP), adopted by the European Commission in September 2016, calls for achieving uninterrupted 5G coverage in all urban areas and along all main transport paths across Europe by 2025.

According to Ericsson, as of 2021, the number of 5G subscriptions in Western Europe is expected to reach 433 million by 2027. In 2021, there were 30.56 million 5G subscriptions in Western Europe. Thus, with the rise in the number of 5G subscriptions in Western Europe, the market will witness ample growth opportunities throughout the forecast period.

Germany to hold significant market share

Germany is one of the major countries in Europe. The upgradation of EU policies, increased power consumption, and a rise in manufacturing units, along with several other construction activities, are expected to increase the demand for cable management systems.

According to Statistisches Bundesamt, 129,000 residential construction permits and 29,000 non-residential building permits were issued in Germany in last year. The number of permits was higher than the previous year for both types of structures. Such a rise in construction activities will create a demand for cable management.

The rise in the demand for underground cable projects for power supply is gradually pushing companies to enter into long-term contracts to commission cables. For instance, Prysmian Group has agreements with German transmission grid operators TransnetBW and TenneT, worth more than USD 800 million, to provide underground cable systems for the SuedLink Corridor.

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Prysmian would design, produce, supply, install, test, and commission 2GW of underground cables from North to South Germany in accordance with the contracts. The company would provide a 525kV high-voltage direct current underground cable system with a 2GW power transmission capacity.

Further, in June 2022, a consortium of 20 lenders led by the European Investment Bank agreed to provide USD 400 million for the NeuConnect interconnector project, a USD 2.8 billion high-voltage direct current link connecting Germany with the United Kingdom. As per the bank, the project's construction would begin by the end of 2022, with completion scheduled for 2028. The submarine cable would have a capacity of 1.4 GW, a length of 725 km, and a DC voltage of 525 kV. It would connect a converter station operated by Tennet near Fedderwarden, in Germany, to the UK network operated by National Grid via a converter station on the Isle of Grain. The German conglomerate Siemens would build the converter stations, and cable manufacturer Prysmian would deploy the cable.

Moreover, as per die medienanstalten, in Berlin, 67% of TV households watched television via cable connection on at least one device, whereas, in Schleswig - Holstein, Hamburg, Mecklenburg - West Pomerania, 53% of TV households watched television via cable connection on at least one device. The rise in the overall number of individuals watching television via cable connection will offer significant growth opportunities to the market during the forecast period.

Europe Cable Management Market Competitor Analysis

The Europe cable management market is competitive and moderately fragmented. Some prominent market players are Thomas & Betts Corporation (ABB group), Schneider Electric SE, Cooper Industries (Eaton), HellermannTyton, etc. These leading manufacturers have identified potential markets in underdeveloped countries and have started entering those regions.

In March 2022, EllaLink, a high-capacity and low-latency fiber-optic submarine cable directly connecting Latin America and Europe, announced its partnership with DE-CIX, a prominent Internet Exchange (IX) operator, creating a new and robust intercontinental ecosystem. With this partnership, DE-CIX would provide access to Southern Europe's largest carrier and data center-neutral interconnection ecosystem.

In February 2022, Prysmian Group received funding of USD135 million from European Investment Bank, which will be used for the company's 2021-2024 R&D plans in Europe, particularly for communications and power grid applications. Further, the money will be spent on innovation and experimentation in using alternative materials for cable design and product optimization, as well as improvements in cable jointing operations.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

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4 MARKET INSIGHTS

- 4.1 Market Overview
- 4.2 Industry Value Chain Analysis
- 4.3 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.3.1 Bargaining Power of Suppliers
 - 4.3.2 Bargaining Power of Consumers
 - 4.3.3 Threat of New Entrants
 - 4.3.4 Threat of Substitutes
 - 4.3.5 Intensity of Competitive Rivalry
- 4.4 Assessment of the Impact of COVID-19 on the Market

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 Innovation and Development in the Cable Management Market
 - 5.1.2 Upgrade and Renewal of Existing Networks in the Developed Economies
- 5.2 Market Restraints
 - 5.2.1 Fluctuating Market Demands and Customization Issues

6 MARKET SEGMENTATION

- 6.1 By Product Type
 - 6.1.1 Cable Trays
 - 6.1.2 Cable Raceways
 - 6.1.3 Cable Conduits
 - 6.1.4 Connectors and Glands
 - 6.1.5 Cable Carriers
 - 6.1.6 Cable Lugs
 - 6.1.7 Junction/Distribution Boxes
 - 6.1.8 Other Product Types (Ties, Covers, Fasteners, and Clips)
- 6.2 By End-User Industry
 - 6.2.1 IT and Telecommunication
 - 6.2.2 Construction
 - 6.2.3 Energy and Utility
 - 6.2.4 Manufacturing
 - 6.2.5 Commercial
 - 6.2.6 Other End-User Industries
- 6.3 By Application
 - 6.3.1 Residential
 - 6.3.2 Commercial
 - 6.3.3 Industrial
- 6.4 By Material
 - 6.4.1 Metallic
 - 6.4.2 Non-metallic
 - 6.4.2.1 PVC
 - 6.4.2.2 PP
 - 6.4.2.3 PE
 - 6.4.2.4 Other Materials
- 6.5 By Country

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- 6.5.1 United Kingdom
- 6.5.2 Germany
- 6.5.3 France
- 6.5.4 Italy
- 6.5.5 Spain
- 6.5.6 Russia
- 6.5.7 Other Countries

7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
 - 7.1.1 Legrand SA
 - 7.1.2 Schneider Electric SE
 - 7.1.3 Thomas & Betts Corporation (ABB Ltd)
 - 7.1.4 Marco Cable Management
 - 7.1.5 Hellermann Tyton
 - 7.1.6 NIEDAX GROUP
 - 7.1.7 Vantrunk International
 - 7.1.8 Panduit
 - 7.1.9 Eaton Corporation
 - 7.1.10 Leviton Manufacturing UK Limited
 - 7.1.11 TE Connectivity
 - 7.1.12 Hubbell

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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