

Southeast Asia Power Transmission and Distribution - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Southeast Asia Power Transmission and Distribution Market is expected to register a CAGR of greater than 8% during the forecast period.

The market was negatively impacted by COVID-19 in 2020. Presently, the market reached pre-pandemic levels.

Key Highlights

- Over the medium term, factors such as increasing penetration of renewable energy sources, rising power consumption, and growing access to electricity, along with expanding and enhancing the power grid infrastructure, are expected to drive the market during the forecast period.
- On the flip side, the growing trend of distributed power generation is expected to restrain the market's growth, as there is no requirement for long-distance transmission infrastructure in distributed power generation.
- Nevertheless, rising demand for modernization and advancements in electrical grids are anticipated to create opportunities for stakeholders and players in the Southeast Asia power transmission and distribution market soon.
- During the forecast period, Vietnam is expected to witness significant demand in the Southeast Asia power transmission and distribution market.

Southeast Asia Power Transmission & Distribution Market Trends

Transmission Type Segment to Witness Significant Growth

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- Southeast Asia is witnessing the fastest rate of population rise along with rapid industrialization in countries, such as Vietnam, Thailand, Indonesia, etc., which requires additional energy-generating capacities compensated primarily by renewable energy sources across the countries in the region, this is likely to surge the demand for HVDC transmission and distribution systems during the forecast period. In 2021, the region had electricity generation of about 1071.76 Wh, which is 43.7 Wh higher than in 2020.
- Furthermore, the Southeast Asian countries are home to 600 million people and have a more significant population than the European Union and many economies with huge growth potential to global GDP. However, the non-electrification rate in the region is amongst the highest in the world. Furthermore, the region is home to numerous small islands with increasing power requirements.
- In 2021, PT PLN (Persero), a state-owned Indonesian electricity utility company, announced the plant to develop the Muara Enim - Lampung HVDC Line with a capacity of 500 kV, which is expected to be commissioned by 2026.
- As the demand for electricity increases, coupled with an increase in the electrification rate, the uptake of HVDC projects is expected to grow in the region, particularly in power islands. In addition, the countries have also set ambitious targets in progressing the renewable power sector in the future, which is likely to experience noticeable developments in the countries' power infrastructure.
- Overall, due to the abovementioned factors, the Southeast Asian region is expected to witness significant growth in the HVDC transmission system market over the forecast period.

Vietnam to Witness Significant Demand

- Vietnam's power transmission and distribution infrastructure is struggling to keep pace with the rapid capacity growth, and the surge in renewable energy is making the government invest in power transmission and distribution projects. As of 2021, the country had a renewable energy generation capacity of about 42.7 GW.
- Furthermore, since 2019, the government-owned power company Vietnam Electricity (EVN) invested in 21 transmission lines to smoothly integrate more renewable energy sources. In addition, the government 2021 launched Vietnam's Power Transmission Plan 8, which aims to invest USD 32.9 billion to develop a power grid between 2021-2030.
- For instance, in March 2022, EVN signed a contract for equipment provision, facilities construction and installation, and equipment testing and adjustment for 220 kV switching substation and 220 kV power lines connecting Nam Kong 1, 2, 3 Hydropower Plant Cluster Laos to the Vietnamese power system.
- Similarly, as of January 2021, National Power Transmission Corporation (EVNNPT) plans to invest VND 17.55 trillion in 107 transmission projects in 2021. The utility's major focus will be on commencing the construction of 44 projects, including 7500 kV and 37220 kV project.
- Overall, the increasing power generation capacity and government investment in transmission and distribution lines would aid the market.

Southeast Asia Power Transmission & Distribution Industry Overview

The Southeast Asia Power Transmission and Distribution market is a moderately fragmented one. Some of the key players in the market (not in any particular order) include Vietnam Electricity, Toshiba Corporation, Romelectro Group, Mitsubishi Electric Corporation, and General Electric Company.

Additional Benefits:

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

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