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Global Wind Blade Moulds Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Wind Blade Moulds market size is expected to reach $ 412 million by 2032, rising at a market growth of 6.3% CAGR during the forecast period (2026-2032).

Wind Blade Moulds are specialised production tools used to directly form blade shells and structural components such as shear webs during the manufacture of composite wind turbine blades. Their moulding surfaces reproduce the intended geometry of the components and provide shape restraint and dimensional control during reinforcement lay-up, resin impregnation and curing. These moulds typically comprise a moulding surface, a supporting structure and an associated temperature control system, and may incorporate vacuum sealing, turning, positioning and closing mechanisms according to the manufacturing process. They enable repeatable production with consistent component geometry, surface quality and dimensional accuracy.

Key Findings

Demand for Wind Blade Moulds is closely linked to blade production investment and the introduction of new blade models

Blade shell moulds combine aerodynamic surface forming with structural support and production handling functions

Large mould performance depends on geometric stability, temperature uniformity and repeatable operation throughout production cycles

The supplier base combines integrated mould manufacturers with specialists in

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component tooling and prototype development

Market Trends

Wind Blade Moulds are evolving towards larger working dimensions, tighter geometric control and greater integration with blade manufacturing processes. Increasing blade length raises the importance of support-frame stiffness, thermal expansion management and alignment across the full mould surface. Product development consequently extends beyond surface accuracy to encompass coordinated heating, turning and closing operations. Zoned temperature control, improved insulation and accessible heating components address the combined requirements of curing consistency, energy efficiency and maintenance. Modular construction supports the transport and installation of large tooling, although interfaces between sections introduce additional alignment and sealing requirements. Direct-machined moulds and additive manufacturing offer alternative production routes for selected geometries and development programmes, particularly where tooling lead time is commercially significant. Their adoption remains dependent on surface performance, thermal stability and production-life requirements. Across established and emerging technologies, the direction of development is towards closer matching of mould construction, resin chemistry, curing schedules and factory production cycles.

Market Dynamics

Drivers

Expansion of blade manufacturing capacity, introduction of new blade platforms and replacement of worn or technically obsolete moulds provide the principal demand drivers. Wind power development supports the underlying requirement for blade output, while actual mould orders follow factory investment, product changeovers and the allocation of production programmes. New blade geometries can require replacement shell moulds and associated component tooling even when manufacturers retain existing buildings and infrastructure. Localisation of blade production also creates demand as manufacturing capacity moves closer to customers or develops in new markets. The value of tooling extends beyond its purchase price because geometric consistency, reliable curing and repeatable handling influence blade quality and factory throughput. Suppliers with engineering and commissioning capabilities therefore participate in the transition from blade design to stable production. Relationships established during platform development can extend into additional mould orders when

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the same blade model is introduced at other manufacturing locations.

Restraints

The reusable nature of moulds limits the direct relationship between blade output and new tooling demand. Higher utilisation of existing production lines can support additional blade production without a corresponding increase in mould purchases. Procurement also precedes blade delivery and turbine installation, creating differences between the timing of tooling revenue and downstream market activity. Shandong Shuangyi Technology’s non-metallic mould revenue declined by 24.90% in 2025, with wind blade mould order timing and advance procurement contributing to the decrease. This illustrates the sensitivity of supplier revenue to customer investment schedules. Further constraints arise from pressure on equipment prices, the cost of transporting large structures and the limited transferability of highly customised moulds between unrelated blade platforms. Delayed factory expansion or extended use of existing blade designs can reduce orders, while concentrated delivery and acceptance schedules produce uneven revenue recognition and capacity utilisation for mould manufacturers.

Opportunities

New offshore blade platforms and changes in blade structural design create opportunities for suppliers capable of combining large-scale tooling with specialised component manufacturing knowledge. Where production processes separate structural component forming from shell assembly, dedicated spar cap, shear web and blade root preform moulds support parallel operations and more flexible production scheduling. Research programmes also create demand for tooling that accommodates unfamiliar geometries, alternative resin systems and revised curing processes. Floating offshore wind contributes to this development segment when new rotor configurations require different manufacturing approaches. Kleizen Modelmakerij’s involvement in the TouchWind prototype programme demonstrates the role of specialist mould manufacturers in such projects. Gulf Wind Technology’s mould-making activities similarly connect tooling development with blade engineering and prototype manufacture. These opportunities favour engineering responsiveness and process knowledge, allowing specialised businesses to participate alongside suppliers focused on repeated delivery of large production mould systems.

Challenges

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Maintaining geometric and thermal performance throughout repeated production cycles is a central technical challenge. Longer and more complex moulds increase the consequences of structural deflection, differential thermal expansion, vacuum leakage and uneven heating. Errors in positioning or closing can affect component alignment and interrupt downstream assembly, while mould-surface deterioration can increase maintenance requirements and reduce production availability. Suppliers also face changes to customer designs after manufacturing has begun, differences between factory acceptance conditions and operating environments, and interface responsibilities involving customer equipment. Commercial challenges include customer concentration, delayed acceptance, working-capital commitments and changes in the financial condition of blade manufacturers. TPI Composites' emergence from Chapter 11 under new ownership in July 2026 illustrates the relevance of financial restructuring within the customer and supplier base. Delivery continuity, technical support and the ability to sustain contractual obligations consequently remain important factors in commercial relationships.

Industry Chain Analysis

Upstream inputs include tooling resins, reinforcement fibres, surface materials, structural steel, heating elements, liquid-circulation components, insulation, sensors and control equipment. Midstream manufacturing combines process engineering, mould-surface fabrication, composite processing, support-frame construction, system integration and acceptance testing. Downstream demand originates from wind turbine manufacturers, independent blade manufacturers and organisations developing or validating blade technology. Value creation centres on the accurate transfer of blade geometry into durable production tooling and the integration of thermal and mechanical functions that support consistent output. Manufacturing economics vary with mould dimensions, material selection, engineering complexity, integrated equipment and delivery conditions. Customised designs and project-based acceptance make engineering execution and production scheduling important determinants of supplier profitability.

Segment Insights

Blade Shell Moulds provide the external aerodynamic surfaces and the main forming equipment for shell production. Their construction combines extensive moulding surfaces with support structures and, where required, integrated turning and closing systems. Spar Cap Moulds, Shear Web Moulds and Blade Root Preform Moulds serve

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distinct structural-component operations, with demand determined by blade architecture and manufacturing processes. Dedicated Spar Cap Moulds are associated with production routes that form the spar cap separately; the use of alternative reinforcement and assembly methods changes the tooling requirement. Shear Web Moulds support the manufacture of internal structural members, while Blade Root Preform Moulds support repeatable preparation of root components. Others encompasses forming moulds for remaining blade components, including separately manufactured blade tips. NORCO's blade-tip tooling experience demonstrates the commercial role of this segment within specialised blade manufacturing programmes.

By Mould Length, the market comprises Moulds Below 80 m, Moulds from 80 m to 100 m, and Moulds Above 100 m. The middle category includes both boundary values, and classification follows the assembled mould's effective working length. Short component moulds can serve long-blade programmes, so the length distribution reflects both component mix and blade dimensions. Increasing mould length raises structural, thermal and logistical complexity, particularly for full-length shell tooling. By Mould Heating Method, Electrical Resistance-Heated Moulds integrate heating elements and electrical controls, while Liquid-Circulation-Heated Moulds transfer heat through circulating fluid and associated distribution systems. Their operating characteristics differ in zoning, installation, maintenance and temperature management. Others covers hybrid and alternative configurations. Heating technology is selected in relation to mould construction, curing requirements and factory utilities rather than determined solely by mould length.

Downstream Market Opportunities

Onshore Wind Turbine Blades generate demand through commercial blade production, model renewal and investment in manufacturing capacity. Procurement is closely connected to factory throughput, equipment availability and overall production cost. Offshore Wind Turbine Blades create demand for tooling capable of maintaining accuracy and thermal consistency across large composite structures, with production reliability becoming particularly important as blade dimensions increase. Wind Turbine Blade R&D, Prototyping and Process Validation serves the development of new geometries, structural concepts, materials and manufacturing methods. This segment places greater weight on engineering adaptability, development speed and access to process expertise. Dedicated development tooling is distinguished from serial-production moulds by its primary contracted purpose, while trial production carried out during commissioning remains part of the relevant production application. Across these applications, mould demand is concentrated at blade manufacturing and development

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facilities, where design decisions translate into equipment orders.

Regional Insights

China is an important manufacturing and demand centre for Wind Blade Moulds, supported by its extensive blade supply chain, specialist mould producers and domestic wind turbine industry. China accounted for approximately 73% of global new wind capacity in 2025, demonstrating the scale of its downstream market, although mould purchasing also reflects exports, factory utilisation and procurement lead times. Europe combines blade-platform engineering with specialist composite tooling and large-mould manufacturing capabilities. North America supports both commercial blade production and development-oriented tooling, including activities connecting engineering, prototyping and manufacturing. India’s expanding role in blade production creates additional demand, with Gurit identifying stronger Indian activity within its manufacturing solutions business. Elsewhere in Asia, opportunities depend on the location of blade factories and technology-development programmes. The geographic distribution of mould revenue is consequently linked to manufacturing investment and supplier delivery networks, while final turbine installation provides a broader indicator of downstream demand.

Competitive Landscape Analysis

The competitive landscape comprises manufacturers of integrated mould systems, specialised composite tooling businesses and blade manufacturers with in-house tooling capabilities. Gurit and Dencam Composite provide dedicated blade mould solutions, while Shandong Shuangyi Technology, Beijing Composite Materials and Titan Wind Energy (Suzhou) participate through established mould manufacturing operations in China. Competition among these suppliers’ centres on geometric and thermal performance, delivery execution, commissioning and customer relationships. Gulf Wind Technology connects mould manufacture with engineering and development services, NORCO Composites & GRP has blade-tip tooling experience, and Kleizen Modelmakerij participates in prototype programmes. Across these business models, competitive differentiation rests on reliable production performance, project-specific engineering expertise and the total cost of delivering operational tooling.

Report Scope

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This report studies the global Wind Blade Moulds production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Wind Blade Moulds and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Wind Blade Moulds that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Wind Blade Moulds total production and demand, 2021-2032, (Sq m)

Global Wind Blade Moulds total production value, 2021-2032, (USD Million)

Global Wind Blade Moulds production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Sq m), (based on production site)

Global Wind Blade Moulds consumption by region & country, CAGR, 2021-2032 & (Sq m)

U.S. VS China: Wind Blade Moulds domestic production, consumption, key domestic manufacturers and share

Global Wind Blade Moulds production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Sq m)

Global Wind Blade Moulds production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Sq m)

Global Wind Blade Moulds production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Sq m)

This report profiles key players in the global Wind Blade Moulds market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Gurit, Dencam Composite, Gulf Wind

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Technology, NORCO Composites & GRP, Kleizen Modelmakerij, TPI Composites, Shandong Shuangyi Technology, Beijing Composite Materials, Titan Wind Energy (Suzhou), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Wind Blade Moulds market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Sq m) and average price (US$/Sq m) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Wind Blade Moulds Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Wind Blade Moulds Market, Segmentation by Type:

Blade Shell Moulds

Spar Cap Moulds

Shear Web Moulds

Blade Root Preform Moulds

Others

Global Wind Blade Moulds Market, Segmentation by Mould Length:

Moulds Below 80 m

Moulds from 80 m to 100 m

Moulds Above 100 m

Global Wind Blade Moulds Market, Segmentation by Mould Heating Method:

Electrical Resistance-Heated Moulds

Liquid-Circulation-Heated Moulds

Others

Global Wind Blade Moulds Market, Segmentation by Application:

Onshore Wind Turbine Blades

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Offshore Wind Turbine Blades

Wind Turbine Blade R&D, Prototyping and Process Validation

Companies Profiled:

Gurit

Dencam Composite

Gulf Wind Technology

NORCO Composites & GRP

Kleizen Modelmakerij

TPI Composites

Shandong Shuangyi Technology

Beijing Composite Materials

Titan Wind Energy (Suzhou)

Key Questions Answered

1. How big is the global Wind Blade Moulds market?
2. What is the demand of the global Wind Blade Moulds market?
3. What is the year over year growth of the global Wind Blade Moulds market?
4. What is the total value of the global Wind Blade Moulds market?
5. Who are the Major Players in the global Wind Blade Moulds market?
6. What are the growth factors driving the market demand?

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