

# **Global Onshore Wind Turbine Condition Monitoring System Market Growth (Status and Outlook) 2026-2032**

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## **Abstracts**

The global Onshore Wind Turbine Condition Monitoring System market size is predicted to grow from US\$ 107 million in 2025 to US\$ 165 million in 2032; it is expected to grow at a CAGR of 6.5% from 2026 to 2032.

Onshore Wind Turbine Condition Monitoring System refers to an integrated monitoring solution installed on land-based wind turbines to continuously or periodically evaluate the operating condition and health status of critical mechanical and structural components. The system typically combines vibration, acceleration, temperature, rotational speed, strain, acoustic, oil condition and other sensing technologies with data acquisition hardware, communication modules, diagnostic software and condition-analysis algorithms. Key monitoring targets include the drivetrain, blades, tower, foundation and other critical assemblies, with functions covering abnormal-condition detection, fault diagnosis, degradation tracking, maintenance planning and asset-health assessment. According to monitoring coverage, the market is classified into Drivetrain Condition Monitoring System, Blade Condition Monitoring System, Structural Health Monitoring System and Integrated Wind Turbine Condition Monitoring System. Important system parameters include sensor type and quantity, monitoring channels, sampling frequency, measurement range, communication method, data-processing architecture, alarm capability and integration with wind farm operation and maintenance platforms. This study focuses on Onshore Wind Turbine Condition Monitoring System deployed in Plain Wind Farm and Mountain Wind Farm environments to support reliability improvement, predictive maintenance and lifecycle management of onshore wind turbine assets.

## **Key Findings**

Drivetrain Condition Monitoring System remains a core monitoring configuration for critical rotating components

Integrated Wind Turbine Condition Monitoring System is extending monitoring from individual components toward whole-turbine health management

Retrofit demand from aging onshore wind fleets is becoming an important source of condition monitoring deployment

Mountain Wind Farm applications place higher requirements on remote diagnostics and maintenance planning

Predictive maintenance is shifting condition monitoring from fault detection toward asset lifecycle optimization

## **Market Trends**

The Onshore Wind Turbine Condition Monitoring System market is evolving from traditional single-component vibration monitoring toward multi-sensor, multi-component and fleet-level health management. Earlier condition monitoring deployments were primarily concentrated on gearboxes, bearings, generators and other drivetrain components because these assets have high repair costs and can cause extended downtime when faults develop. Current system architectures are increasingly expanding toward blades, towers, foundations and other structural components, creating broader Integrated Wind Turbine Condition Monitoring System solutions. At the same time, data utilization is moving from threshold-based alarms toward trend analysis, fault-pattern recognition, remaining-life assessment and maintenance decision support. Remote connectivity is becoming increasingly important because onshore wind farms are often geographically dispersed and may contain multiple turbine platforms of different ages. As a result, operators increasingly value systems capable of consolidating data from heterogeneous turbine fleets and supporting centralized diagnostics. Another important trend is retrofit deployment on existing turbines without comprehensive monitoring coverage, as owners seek to extend operating life, reduce unexpected component failures and improve maintenance planning. The long-term direction is therefore toward broader monitoring coverage, higher sensor integration, more automated diagnostics, stronger remote connectivity and closer integration between condition monitoring data and wind farm operation and maintenance workflows.

## **Market Dynamics**

## Drivers

The principal driver for Onshore Wind Turbine Condition Monitoring System demand is the growing economic importance of turbine availability and maintenance efficiency across expanding onshore wind fleets. Gearboxes, generators, bearings, blades and structural components operate under fluctuating wind loads and repeated mechanical stress, and unexpected failures can result in substantial repair expense and prolonged production losses. Condition monitoring enables operators to identify abnormal vibration, temperature, structural response or other degradation indicators before faults develop into major failures, allowing maintenance activities to be planned in advance. The continued aging of installed onshore wind fleets also increases the need for health monitoring because component failure probability generally rises as turbines accumulate operating hours and repeated load cycles. At the same time, wind farm owners are shifting from reactive maintenance toward predictive and condition-based maintenance strategies to improve asset availability and reduce unnecessary scheduled interventions. Larger turbine ratings and higher replacement-component costs further increase the economic value of early fault detection. These factors make condition monitoring an increasingly important part of lifecycle asset management rather than a standalone diagnostic function.

## Restraints

Market development is constrained by system installation cost, heterogeneous turbine platforms, data-quality challenges and the difficulty of converting monitoring signals into reliable maintenance decisions. Existing onshore wind farms may contain turbines from different manufacturers and generations, each with different drivetrain layouts, sensor interfaces, control systems and communication protocols. This increases the complexity of retrofit projects and limits the degree of standardization achievable across fleets. Condition monitoring also generates large volumes of operational data, but false alarms, inconsistent sensor installation, environmental noise and variable operating loads can reduce diagnostic accuracy if algorithms are not properly adapted to the specific turbine platform. For smaller or lower-value turbines, owners may find it difficult to justify comprehensive multi-component monitoring when the cost of sensors, data acquisition, communications and specialist analysis represents a relatively high proportion of asset value. In addition, data ownership, cybersecurity and compatibility with existing supervisory and maintenance systems may complicate fleet-wide deployment. These factors require suppliers to balance monitoring depth, diagnostic accuracy and lifecycle economic value.

## Opportunities

One of the most significant opportunities lies in retrofitting aging onshore wind turbines that were originally installed without comprehensive condition monitoring capability. As operators seek to extend turbine operating life beyond initial design assumptions or postpone major repowering investment, more precise knowledge of drivetrain, blade and structural condition becomes increasingly valuable. Retrofit systems that can reuse existing sensors, communication infrastructure or turbine data interfaces can lower installation complexity and improve project economics. Integrated Wind Turbine Condition Monitoring System also provides an important growth opportunity by combining drivetrain, blade and structural monitoring within a unified data environment, allowing operators to assess interactions among different components rather than managing isolated alarms. Further opportunities exist in remote and geographically challenging Plain Wind Farm and Mountain Wind Farm projects where centralized monitoring can reduce unnecessary site visits and support maintenance scheduling. As operators increasingly manage mixed fleets containing different turbine models, vendor-neutral platforms capable of consolidating multiple monitoring systems and normalizing asset-health information can create additional value. Condition monitoring may also support life-extension assessments, partial repowering decisions and maintenance-resource optimization.

## Challenges

The long-term challenge is achieving high diagnostic reliability across turbines operating under highly variable wind, temperature and load conditions. A wind turbine is not a constant-speed industrial machine, and changes in rotational speed, power output, turbulence and control strategy can alter vibration and structural signatures even when the equipment is healthy. Effective fault detection therefore requires normalization of operating conditions and deep understanding of turbine-specific behavior. Another challenge is converting early anomaly detection into actionable maintenance recommendations. Excessively sensitive systems can create alarm fatigue, while insufficient sensitivity may fail to identify developing damage. Suppliers must also support increasingly long equipment lifecycles, meaning monitoring hardware, software and communication technologies need to remain maintainable even as digital platforms evolve. Cybersecurity is becoming more important as remote monitoring systems connect operational assets with centralized data platforms. In addition, expanding monitoring from drivetrains to blades, towers and foundations increases the diversity of sensing technologies and analytical models required. Market success therefore depends not only on sensor performance but also on data interpretation, system

integration and the ability to demonstrate consistent operational value.

## Industry Chain Analysis

The upstream segment of the Onshore Wind Turbine Condition Monitoring System industry mainly consists of vibration and acceleration sensors, temperature sensors, rotational-speed sensors, strain sensors, acoustic sensors, oil-condition sensors, signal-conditioning components, data acquisition modules, embedded processors, communication modules, industrial connectors, cables and protective enclosures. Sensor accuracy, measurement stability, environmental resistance and long-term reliability directly affect monitoring quality because wind turbines operate under vibration, temperature variation, humidity, dust and electromagnetic interference. Data acquisition hardware must support sufficient sampling frequency, synchronization and channel capacity to capture mechanical fault characteristics, while communication modules provide data transmission between turbines, local wind farm networks and remote monitoring centers.

The midstream combines system design, hardware integration, monitoring software, signal processing, fault diagnosis, data analytics, installation, commissioning and ongoing technical support. The greatest value is created through the conversion of raw sensor data into reliable equipment-health information and maintenance decisions. Downstream users are primarily owners, operators and maintenance organizations of Plain Wind Farm and Mountain Wind Farm assets. Their purchasing decisions increasingly consider not only hardware price but also diagnostic accuracy, alarm quality, platform compatibility, retrofit convenience, remote support capability and total lifecycle cost. As monitoring systems become more integrated, software, analytics and engineering services are accounting for a larger proportion of value creation, while hardware remains the foundation for reliable data acquisition.

## Segment Insights

Drivetrain Condition Monitoring System represents one of the most established and technically mature segments because drivetrain components such as gearboxes, bearings, shafts and generators are critical to turbine availability and are well suited to vibration-based diagnostic techniques. This segment is particularly important for geared turbines and aging fleets where component degradation can lead to costly major repairs. Continuous monitoring of characteristic frequencies, vibration trends and related operating parameters allows operators to detect bearing damage, gear defects, imbalance, looseness and alignment problems at an earlier stage. As a result, drivetrain

monitoring remains an important foundation for condition-based maintenance programs.

Blade Condition Monitoring System and Structural Health Monitoring System are becoming increasingly important as operators extend the scope of asset-health management beyond rotating machinery. Blade monitoring addresses defects such as structural damage, imbalance and progressive deterioration, while structural monitoring focuses on towers, foundations and associated load-bearing components. Integrated Wind Turbine Condition Monitoring System combines these monitoring domains and represents a broader development direction, particularly for newer projects and operators managing large fleets. The value proposition of integrated systems lies in correlating signals from multiple components, providing a more complete view of turbine condition and enabling maintenance priorities to be determined at the asset and fleet levels rather than solely at the individual component level.

## **Downstream Market Opportunities**

Plain Wind Farm applications typically benefit from relatively convenient road access and more standardized maintenance logistics, making condition monitoring valuable primarily for improving fleet availability, optimizing scheduled maintenance and reducing unnecessary component replacement. Large-scale projects with many turbines can create significant value from centralized monitoring because even small improvements in maintenance planning can accumulate across the fleet. Mountain Wind Farm applications generally involve more difficult terrain, longer travel time, more complex access conditions and potentially greater variability in environmental loads. Under these conditions, remote diagnostics and early warning have greater operational value because they can reduce unnecessary site visits and allow maintenance teams, cranes and replacement components to be arranged before faults become critical. Across both applications, aging turbines and life-extension projects provide an important opportunity because asset owners require increasingly detailed health information to determine whether components should continue operating, be repaired or be replaced.

## **Regional Insights**

Europe represents an important development and application region for Onshore Wind Turbine Condition Monitoring System because of its large installed base of mature onshore wind assets, established wind turbine operation and maintenance ecosystem and increasing focus on lifecycle extension. Many European wind farms contain turbines that have operated for extended periods, supporting demand for drivetrain monitoring, retrofit systems and broader asset-health management solutions. The

region also has a strong industrial base in vibration monitoring, wind turbine automation and mechanical drivetrain engineering, contributing to continued development of specialized monitoring technologies. North America provides another significant application environment, particularly where large geographically dispersed wind fleets create demand for remote diagnostics, fleet-level monitoring and predictive maintenance.

China represents an important market opportunity due to its large onshore wind turbine installed base and growing emphasis on improving turbine reliability, operational efficiency and intelligent wind farm management. Domestic condition monitoring capabilities are expanding alongside the broader development of industrial sensing, predictive maintenance and wind power digitalization. Other Asia-Pacific markets also present opportunities as onshore wind capacity expands and operators place greater emphasis on professional operation and maintenance. Regional requirements vary according to turbine age, fleet structure, terrain, maintenance organization and local operating conditions. Mature markets tend to generate stronger retrofit and life-extension demand, while markets with newer wind fleets provide greater opportunities for integrated monitoring systems to be incorporated during turbine installation or early operating stages.

## **Competitive Landscape Analysis**

The Onshore Wind Turbine Condition Monitoring System market has a diversified competitive structure involving specialist condition monitoring companies, vibration and predictive-maintenance technology suppliers, wind power automation providers and companies with strong mechanical drivetrain expertise. Competition is increasingly shifting from basic sensor and data-acquisition capability toward diagnostic accuracy, multi-component coverage, fleet compatibility and the ability to convert condition data into maintenance decisions. Established participants often differentiate through accumulated fault databases, long-term monitoring experience, certified monitoring platforms and engineering expertise, while newer and specialized suppliers may compete through lower-cost retrofit architectures, compact sensing hardware and more flexible software deployment. The presence of multiple wind turbine manufacturers and legacy monitoring systems creates demand for vendor-neutral solutions capable of integrating heterogeneous fleets. In addition, Integrated Wind Turbine Condition Monitoring System raises the technical threshold because suppliers must combine drivetrain, blade and structural monitoring rather than specialize in a single signal type. Future competitive differentiation is expected to depend increasingly on early fault-detection capability, false-alarm control, remote analytics, system interoperability,

cybersecurity, lifecycle technical support and the economic value delivered through reduced downtime and optimized maintenance.

## Report Scope

LPI (LP Information)' newest research report, the “Onshore Wind Turbine Condition Monitoring System Industry Forecast” looks at past sales and reviews total world Onshore Wind Turbine Condition Monitoring System sales in 2025, providing a comprehensive analysis by region and market sector of projected Onshore Wind Turbine Condition Monitoring System sales for 2026 through 2032. With Onshore Wind Turbine Condition Monitoring System sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Onshore Wind Turbine Condition Monitoring System industry.

This Insight Report provides a comprehensive analysis of the global Onshore Wind Turbine Condition Monitoring System landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Onshore Wind Turbine Condition Monitoring System portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Onshore Wind Turbine Condition Monitoring System market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Onshore Wind Turbine Condition Monitoring System and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Onshore Wind Turbine Condition Monitoring System.

This report presents a comprehensive overview, market shares, and growth opportunities of Onshore Wind Turbine Condition Monitoring System market by product type, application, key players and key regions and countries.

## Market Segmentation

### Segmentation by Type:

Drivetrain Condition Monitoring System

Blade Condition Monitoring System

Structural Health Monitoring System

Integrated Wind Turbine Condition Monitoring System

### **Segmentation by Deployment:**

On-Premises Monitoring System

Cloud-Based Monitoring System

Hybrid Monitoring System

### **Segmentation by Number of Monitoring Channels:**

8 Channels and Below

9–16 Channels

Above 16 Channels

### **Segmentation by Application:**

Plain Wind Farm

Mountain Wind Farm

### **This report also splits the market by region:**

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

SKF

Bachmann electronic GmbH

Brüel & Kjær Vibro GmbH

KK Wind Solutions A/S

ONYX Insight

Baker Hughes Company (Bentley Nevada)

Flender GmbH

PRUFTECHNIK Dieter Busch GmbH

Acoem

Anhui Ronds Science & Technology Incorporated Company

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