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Opportunity Assessment for Maintenance, Repair & Overhaul in the Global Wind Energy Market: Trends, Forecasts & Economic Analysis 2008-2013

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Abstracts

Lucintel believes that an enormous opportunity is available for suppliers of maintenance, repair and overhaul services through planned and unplanned maintenance, annual outages, long-term service agreements (LTSAs), long term maintenance contracts, corrective repair, and complete periodic overhaul of various plant and equipment (i.e., replacement parts business). Currently, maintenance, repair and overhaul costs contribute to 20% - 25% of expenditures in the wind turbine market. Thus MRO spending trends are increasingly attracting the attention of service providers.

From a global perspective, wind power is undergoing rapid development. Within the past 10 years, the global installed capacity increased from 7 GW to around 100 GW at the end of 2007. With the aging of wind farms, the opportunity for after-market service providers is bound to grow. This research will provide an understanding of the maintenance, repair and overhaul requirements and strategies of wind farms globally, as well as the key strategic opportunities and players within this sector.

In particular, this study will provide the following:

Current Practices: An understanding of current practices and preferences of wind farms related to maintenance, repair and overhaul services, including frequency & duration of scheduled maintenance and major overhauls;

Supplier Selection Criteria: An understanding of the key criteria for supplier selection; list of major service providers

MRO Cost Analysis: Major maintenance, repair and overhaul costs; Impact of

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turbine capacity on MRO cost;

Market Estimates: Market size of MRO in Global Wind Turbine Market;

Market segmentation: MRO market size breakdown by type of service (maintenance, repair, overhaul), type of components (blade, gear box, generator);

Regional Analysis: Market size of MRO by region;

Trends and Forecasts Analysis: Trends (2002-2007) and Forecasts (2008-2013) for MRO market in terms of market size, technology changes, and types of service.

Strategic Analysis: A sound basis, in the form of a framework for maintenance, repairs and overhauls suppliers to formulate an effective competitive strategy.

This report answers following Key information related to the wind energy market.

Operational and maintenance areas conducted in-house vs. outsourced;

Understanding of global wind energy market in terms of trends in cumulative installed capacity and forecast for 2009-2014

List of MRO service providers;

Lead time to OEMs for major overhaul jobs;

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