

Onshore Wind Market by Component (Turbines, Electrical Infrastructure), By Turbine Rating (below 2 MW, 2-3 MW, 3-5 MW, and above 5 MW) and Region - Global Forecast to 2035

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Abstracts

The onshore wind market is projected to grow at a CAGR of 10.3% during the forecast period, increasing from an estimated USD 132.47 billion in 2026 to USD 321.14 billion by 2035. Market expansion is driven by the rapid growth of renewable energy generation, rising energy security concerns, ambitious decarbonization targets, and supportive government policies promoting clean power deployment. As countries transition toward low-carbon energy systems, onshore wind has become one of the most cost-effective and scalable renewable energy sources due to its competitive generation costs, mature technology, and relatively shorter project development timelines. Technological advancements, including larger turbines exceeding 5 MW, taller hub heights, longer rotor blades, AI-enabled predictive maintenance, digital twins, and real-time asset monitoring, are improving energy output and operational efficiency. Repowering aging wind farms and integrating battery energy storage systems are further enhancing grid reliability and project economics. However, the market continues to face challenges related to lengthy permitting processes, land acquisition complexities, transmission infrastructure constraints, and local community opposition in certain regions, which can delay project execution and increase development costs despite strong long-term growth prospects.

“By component, the electrical infrastructure segment is expected to be the second largest component segment in the onshore wind market during the forecast period.”

By component, the electrical infrastructure segment is expected to be the second

largest segment in the onshore wind market during the forecast period, supported by the growing need for power transmission, grid integration, and reliable energy distribution. As onshore wind capacity expands, investments in substations, transformers, switchgear, cables, and high-voltage transmission networks are increasing to accommodate larger volumes of renewable electricity. Grid modernization initiatives and the integration of smart grid technologies are further driving demand for advanced electrical infrastructure. Additionally, the deployment of high-capacity turbines and utility-scale wind farms requires robust interconnection systems to ensure stable power delivery, making electrical infrastructure an indispensable component of overall project development and long-term operational efficiency.

“By Turbine Rating, the 2-3 MW segment is projected to register the third fastest growth in the onshore wind market during the forecast period.”

By turbine rating, the 2–3 MW segment is projected to register the third-fastest growth in the onshore wind market during the forecast period, driven by its balance of performance, cost, and deployment flexibility. These turbines are particularly well-suited for regions with moderate wind resources and projects where land availability or grid capacity limits the use of larger machines. They are also widely adopted in emerging markets and distributed utility-scale installations because they offer attractive returns with lower upfront investment. In addition, ongoing upgrades of older wind farms and increasing demand from medium-sized developers are expected to support steady expansion of the 2–3 MW segment over the coming years.

“By region, Europe is estimated to account for the second-largest market share during the forecast period.”

The onshore wind energy market in Europe is estimated to hold the second-largest share during the forecast period, owing to a strong regional renewable energy market, decarbonization targets, policy support, and ongoing investment in infrastructure for green power generation. Countries like Germany, Spain, the UK, France, Sweden, and Italy have made significant investments to expand onshore wind capacity through competitive auctions, sustainable energy transition programs, and supportive policies. The region has an established ecosystem of turbine manufacturers, onshore wind project developers, grid companies, and engineering services providers investing in efficient wind turbines and digital solutions. The increasing use of high-capacity onshore turbines, the repowering of existing projects, and the development of grid infrastructure will drive the onshore wind energy market in Europe. Initiatives taken by governments as part of the European Green Deal and the REPowerEU program, along with the

renewable energy objectives set by individual countries, will spur further investment in onshore wind farm development to ensure energy security and reduce carbon emissions. Moreover, deployment of battery energy storage systems, digital platforms, and smart grids is enhancing grid reliability and offering lucrative opportunities for companies in the regional onshore wind energy market.

In-depth interviews have been conducted with key industry participants, subject-matter experts, C-level executives of leading market players, and industry consultants, among others, to obtain and verify critical qualitative and quantitative information and to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1 - 45%, Tier 2 - 30%, and Tier 3 - 25%

By Designation: C-level Executives - 35%, Directors - 25%, and Others - 40%

By Region: Asia Pacific - 35%, Europe - 30%, North America - 17%, South America – 10%, and Middle East & Africa – 8%

Notes: The company tiers are defined by their total revenue as of 2025. Tier 1: Other designations include sales managers, engineers, and regional managers.

Siemens Energy (Germany), Mingyang Smart Energy Group Co., Ltd. (China), Vestas (Denmark), Goldwind (China), and GE Vernova (US) are among the major players in the onshore wind market. The study includes an in-depth competitive analysis of these key players, including their company profiles, recent developments, and key market strategies.

Research Coverage:

The report defines, describes, and forecasts the global onshore wind market by component, turbine rating, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report comprehensively reviews the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market value estimates, and future trends in the onshore wind market.

Key Benefits of Buying the Report

It provides an analysis of key drivers (Rising Global Renewable Energy Targets Fuel Onshore Wind Deployment, Government Incentives and Decarbonization Policies Support Onshore Wind Expansion), restraints (Grid Integration Constraints Limit Large-Scale Onshore Wind Projects, High capital expenditure

and project development costs), opportunities (High capital expenditure and project development costs, Exp Digitalization and Advanced Turbine Technologies Enhance Project Performance), challenges (Env Transmission Infrastructure Gaps Restrict Onshore Wind Capacity Expansion) influencing the growth of the onshore wind market.

Market Development: Comprehensive information about lucrative markets – the report analyses the onshore wind market across varied regions.

Market Diversification: Exhaustive information about new products and services, untapped geographies, recent developments, and product launches in the onshore wind market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like Vestas (Denmark), Goldwind Science & Technology Co., Ltd. (China), Ming Yang Smart Energy Group Co., Ltd. (China), Siemens Energy (Germany), GE Vernova (US), SANY Renewable Energy Co., Ltd. (China), Suzlon Energy Ltd. (India), Doosan Enerbility (South Korea), Dongfang Electric Wind Power Co. Ltd. (China), Envision Energy (China), Windey Energy Technology Group Co., Ltd. (China), Nordex SE (Germany), Shanghai Electric Wind Power Group (China), CRRC Shandong Wind Power (China), Hitachi Energy Ltd. (Switzerland), ABB (Switzerland), Prysmian Group (Italy), Schneider Electric (France), Inox Wind (India), Senvion India (India), ENERCON Global GmbH (Germany), and Vayona Energy Pvt. Ltd. (India) among others, in the onshore wind market.

Product Innovation/Development: Product innovation and continuous technological advancements are playing a pivotal role in accelerating the growth of the onshore wind market as developers seek higher energy output, improved efficiency, and lower project costs. Manufacturers are increasingly introducing next-generation onshore turbines with capacities exceeding 5 MW, larger rotor diameters, taller hub heights, lightweight composite blades, and advanced drivetrain technologies to maximize power generation across a wider range of wind conditions. At the same time, digital innovations such as AI-enabled predictive maintenance, digital twins, condition monitoring systems, and real-time performance analytics are helping operators reduce downtime and optimize asset performance. These advancements are particularly valuable for utility-scale wind farms and repowering projects, where improving energy yield, extending turbine lifespan, and lowering operating costs are essential for

enhancing long-term project profitability.

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