

China Wind Power Converter Industry Report, 2014-2016

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Abstracts

China now has become the world's largest and the fastest-growing wind power generation market. In 2013, China had a cumulative 91.4GW of wind power capacity, of which 16.1GW was newly-added capacity, accounting for 46.1% of the world's newly installed capacity and ranking No. 1 globally. The surge in wind power installations has driven the development of China wind power converter market, which was worth around RMB 18.8 billion in 2013, soaring by 44.6% from a year earlier.

As a core part of wind turbine, one set of wind power converter is needed to support one set of wind turbine. Calculated by installed capacity of 1.5MW for each set of wind turbine, about 10,726 sets of converters were needed in China in 2013, rising by 26.8% from a year earlier. China's wind power converter output has continued to increase along with the growing demand, arriving at 10,000 sets or so in 2013, up 23.5% year on year.

China's domestic wind power converter manufacturers started late on the business. By the end of 2013, foreign players dominated about 95% of China wind power converter market, with ABB, Convertteam, AMSC and Emerson being the leaders. Domestic Chinese companies chiefly involve Beijing Corona, Sungrow Power, Hopewind, Zhuzhou CSR Times Electric and Qharvest. At the end of 2013, Sungrow Power, Hopewind and Zhuzhou CSR Times Electric had wind power converter capacity of 1,000 sets/a each.

Wind power converter is one of few parts with low localization rate in Chinese wind power equipment industry. Driven by import substitution policies and high profitability of the industry, local Chinese manufacturers are stepping up efforts to develop products, and will gain more market share as technical barriers of wind power converter are

broken one after another.

Wind power converter consists mainly of power component, control device, general component, power electric component, metal material and electric wire. Various power and electronic devices (including power component, control device) are major components of wind power converter, accounting for 50%-55% of the total cost, of which IGBT makes up about 10%; power electric components includes main transformer and high/low voltage switch, occupying 30%-40% of its cost; the remaining 5% or so is held by various materials and structural parts.

According to Development Plan for Renewable Energy during the 12th Five-Year Plan Period by National Energy Administration, it is expected that China's installed capacity of wind power will reach 150 GW by 2020, accounting for 4%-6% of the world's total wind power installations. Calculated based on 1.5MW for one set of wind turbine, the demand for wind power converter is estimated to stay above 8000 sets/a in China during 2014-2016.

China Wind Power Converter Industry Report, 2014-2016 by ResearchInChina focuses on the following:

Development status quo of China wind power converter industry, including market size, supply and demand, competitive landscape, policy environment and forecast for the next three years;

Market Profile of raw materials for wind power converter in China, covering cost structure of raw materials and IGBT and relay markets;

Introduction to China's wind capacity market, involving installed capacity of wind power, market share, import and export, and competitive landscape;

Operation, development in China and wind power converter business of 7 global and 15 Chinese wind power converter manufacturers.

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