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Global and China's Wind Power Industry Research Report 2016-2030

https://marketpublishers.com/r/G70D3D211E9FEN.html
Date: December 2021
Pages: 60
Price: US$ 3,200.00 (Single User License)
ID: G70D3D211E9FEN

Abstracts

Wind power generation refers to the use of wind turbines to directly convert wind energy into electricity. Among the various forms of wind energy utilization, wind power generation is the main form. Among renewable energies, it is also one of the most technically mature way with large-scale development conditions and commercial prospects.

According to CRI's analysis, the total amount of wind energy in the world is about 130 billion kilowatts, of which 20 billion kilowatts are available. Currently, global wind power industry is mainly distributed in the United States, Europe, China and other regions, increasing from 31.9GW in 2013 to 93GW in 2020, a CAGR of 16.5% during 2013-2020.

The continued increase in newly installed wind power capacity in China has made China the largest region in the world in terms of cumulative installed wind power capacity, surpassing the EU. 2020 is a record year for the global wind power industry, with 93GW of new installations worldwide, up 53% YOY.

In 2020, China’s newly added wind power capacity reached 52GW, double the amount of new wind power capacity installed in 2019. China has become one of the world's largest wind power markets, with record growth in installed wind power in 2020, and its onshore wind power was responsible for 56.3% of the total new installations worldwide.

In the emerging offshore wind sector in recent years, the total cumulative global offshore wind power installed in 2020 was 35 GW, with 6.1 GW of new installations, down slightly from 6.24 GW in 2019.

China achieved more than 3 GW of new grid-connected offshore wind power in 2020, becoming the world's largest offshore wind market for the third consecutive year. The European market maintained steady growth, with the Netherlands ranking second globally with nearly 1.5 GW of new installations and Belgium in third place (706 MW).

It is expected that with the existing wind power policy, 235 GW of new offshore wind power will be installed worldwide in the next decade, an increase equivalent to seven times the existing offshore wind power installation.

According to CRI's analysis, China's wind power market is somewhat different from the global market. 20,401 new units was installed in China in 2020, with a capacity of 54.43 million kW, an increase of 105.1% YOY. Such a prosperous market, however, has barely developed relationships with overseas companies.

The world's highest-ranked company, Vestas, accounts for only 2.1% of installed capacity in China’s wind turbine market, ranking 11th in terms of new installed capacity for China’s wind turbine manufacturers in 2020.

Accordingly, overseas markets are not open to Chinese companies. In 2020, China exported a total of 1188 MW of wind turbine capacity, accounting for only 2-3% of the total global installed capacity outside of China. At the same time, China's wind power machine industry is highly concentrated.

The leading enterprises are more advanced in capital, technology accumulation, and industry chain integrity, with obvious advantages in the market competition, so they hold a stable leading position.

Xinjiang Goldwind Science & Technology Co., Ltd., Envision Energy and Ming Yang Smart Energy Group Limited, three wind turbine manufacturers, have been holding the top three positions in the industry since 2016. During 2016 to 2020, according to the size of the Chinese market, CR5 increased from 60% to 70%, CR10 from 84% to 90%.

In terms of cost, wind power costs are lower than PV costs. Globally, among offshore wind, onshore wind, and PV, onshore wind has the lowest LCOE of 0.25 RMB/KWh. According to the global LCOE data published by the International Renewable Energy Agency (IRENA), offshore wind, onshore wind, and PV had decreased by 48%, 56%, and 85% respectively, during 2010 to 2020. By 2020, the LCOE for offshore wind, onshore wind, and PV was about RMB 0.54/KWh, RMB 0.25/KWh, and RMB 0.37/KWh respectively.

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Compared to the decline in PV, onshore wind power still has more room for improvement. China's average LCOE for onshore wind is among the highest in the world, at 0.24 RMB (about 3.7 cents)/KWh in 2020.

According to the plan of China’s National Energy Administration, China's total installed wind PV capacity will reach more than 1.2 billion kW (about 1200 GW) by the end of 2030. It means that during 2022-2030, China will need to add at least about 300 million kW of wind power, with an average annual installed capacity of at least 30 GW. For wind power, with little policy change, the industry will continue to grow at least by 2030. And the global wind power industry is expected to continue to have strong growth momentum by 2050.

Topics covered:

Overview of the wind power industry

Economic and policy environment of wind power

What is the impact of COVID-19 on the wind power industry?

Global and China's Wind Power Market Size, 2016-2021

Forecast on Global and China's Wind Power Market, 2022-2030

Analysis of the development status of offshore wind power

Analysis of major wind power companies

Key drivers and market opportunities in the wind power industry

What are the key drivers, challenges and opportunities for the wind power industry during the forecast period 2022-2030?

What is the expected revenue of the wind power market during the forecast period of 2022-2030?

What are the strategies adopted by the key players in the market to increase their market share in the industry?

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Which segment of the wind power market is expected to dominate the market in 2030?

What are the major adverse factors facing the wind power industry?

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Contents

1 WIND POWER INDUSTRY OVERVIEW

1.1 Definition and Classification
  1.1.1 Definition
  1.1.2 Classification
1.2 Global Wind Power Industry Overview
1.3 Impact of COVID-19 on Wind Power Industry

2 WIND POWER INDUSTRY DEVELOPMENT ENVIRONMENT 2016-2020

2.1 Economic Environment
  2.1.1 Global Economy
  2.1.2 China’s Economy
2.2 Policy Environment
  2.2.1 Policy Overview
  2.2.2 Policy Trends

3 CURRENT SITUATION OF WIND POWER INDUSTRY, 2016-2021

3.1 Supply
  3.1.1 Global Production
  3.1.2 China's Production
3.2 Demand
  3.2.1 International Market
  3.2.2 China's market
3.3 Analysis of Offshore Wind Power Industry

4 WIND POWER INDUSTRY CHAIN, 2016-2022

4.1 Components of the Wind Power Industry Chain
  4.1.1 Overview
  4.1.2 Blade
  4.1.3 Casting
  4.1.4 Bearings
  4.1.5 Gearboxes
4.2 Cost Analysis of wind power industry chain

4.2.1 Raw Material Costs
4.2.2 Power Generation Costs

5 GLOBAL AND CHINA'S WIND POWER INDUSTRY KEY REGIONS, 2016-2021

5.1 China
5.1.1 East China
5.1.2 North China
5.1.3 Northeast China
5.1.4 Central China
5.1.5 Other regions
5.2 United States
5.3 Europe
5.4 Other Regions

6 ANALYSIS OF CHINA'S WIND POWER EQUIPMENT IMPORT AND EXPORT, 2018-2021

6.1 Wind Power Equipment Exports
6.1.1 Overview of wind power equipment exports
6.1.2 China's main export destinations of wind power equipment
6.2 Wind Power Equipment Imports
6.2.1 Overview of imports
6.2.2 Major Import Sources

7 MAJOR WIND POWER EQUIPMENT MANUFACTURERS, 2020-2022

7.1 Wind Turbine Manufacturers
7.1.1 Xinjiang Goldwind Science & Technology Co., Ltd.
7.1.2 Envision Energy
7.1.3 Ming Yang Smart Energy Group Limited
7.1.4 Electric Wind Power
7.1.5 Zhejiang Windey Co
7.1.6 CRRC Wind Power (Shandong) Co., Ltd.
7.1.7 Dongfang Electric
7.1.8 Sany Renewable Energy Co.,Ltd
7.1.9 China State Shipbuilding Corporation
7.1.10 Guodian United Power Technology Company Limited
7.2 Wind Power Operators

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7.2.1 China Guodian Corporation
7.2.2 China Datang Corporation
7.2.3 China Huaneng Group
7.2.4 China Best
7.2.5 CNOOC
7.2.6 Jingneng Group
7.2.7 Luneng Group
7.2.8 Concord New Energy
7.2.9 Hong Kong Energy (Holdings) Limited
7.2.10 Tianrun Group

8 OUTLOOK ON GLOBAL AND CHINA'S WIND POWER INDUSTRY, 2022-2030

8.1 Influencing Factors of Global and China's Wind Power Industry Development, 2022-2030
8.1.1 Drivers and Market Opportunities for Wind Power Industry, 2022-2030
8.1.2 Threats and Challenges to the Wind Power Industry
8.2 Forecast on China's Wind Power Industry Supply, 2022-2030
8.2.1 Forecast on China's Wind Power Capacity, 2022-2030
8.2.2 Forecast on China's Wind Power Production, 2022-2030
8.3 Forecast on Wind Power Demand, 2022-2030
8.3.1 Forecast on Global Wind Power Market
8.3.2 Forecast on China's Wind Power Market Demand
8.4 Investment and Development Suggestions for China's Wind Power Industry, 2022-2030

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Selected Charts

SELECTED CHARTS:

Chart Chinese Government Support Policies for the Wind Power Industry
Chart Restrictive Policies Issued by the Chinese Government for the Wind Power Industry
Chart Global Newly Installed Capacity of Wind Power, 2016-2021
Chart Newly Installed Capacity of Wind Power in China, 2016-2021
Chart Global Newly Installed Capacity of Offshore Wind Power 2016-2021
Chart Newly Installed Capacity of Offshore Wind Power in China, 2016-2021
Chart China Polysilicon Price Trend, 2016-2021
Chart China's Wind Power Equipment Export Value, 2016-2021
Chart China's Wind Power Equipment Export Volume, 2016-2021
Chart China's Main Export Destinations of Wind Power Equipment, 2021
Chart China's Bearing Import Volume, 2016-2021
Chart Major Import Sources of Bearings in China, 2020
Chart Overview of Xinjiang Goldwind Science & Technology Co., Ltd.
Chart Operation of Xinjiang Goldwind Science & Technology Co., Ltd.
Chart Key Financial Indicators of Xinjiang Goldwind Science & Technology Co., Ltd., 2018-2020
Chart Overview of Envision Energy
Chart Operation of Envision Energy
Chart Key Financial Indicators of Envision Energy
Chart Forecast on China's Wind Turbine Production, 2022-2030
Chart Forecast on Global Wind Power Installed Capacity, 2022-2030
Chart Forecast on China's Wind Power Installed Capacity, 2022-2030

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