

China Wind Power Industry and Market Forecast (2004~2015)

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Abstracts

The Chinese government began to support its wind power industry in 2005 to supply sufficient power throughout the country through introduction of renewable energy for reduction of greenhouse gas emissions, cultivation of new growth engine industries and job creation, and distributed generation. With the unwavering support of the government, China has taken the lead in newly installed wind power capacity from 2009 to 2011.

To protect its wind power industry, the Chinese government had established and implemented a '70% Home-Made' rule which required 70% of wind turbine installed by wind power projects of national enterprises should be domestically made from 2005 to 2009, and brought in an FIT system to facilitate wind power generation in 2007. With the quota system for domestic facilities and the FIT system, China has shown very fast growth in wind power installation from 0.2GW in 2004 to 18.9GW in 2010 and 17.6GW in 2011. In addition, the quota system for domestic facilities served a momentum of growth not only in the wind turbine industry but also in key component industries. As the Chinese government facilitated the growth in the domestic wind power turbine industry and key component industries to expand the domestic market, the prices of wind turbine prices dropped, which again paved the way for the growth in the wind turbine installation market. This recurring cycle has promoted the growth of the Chinese wind turbine installation market; the market has shown CAGR of 90.1% (GAGR of the global wind generation market is 25.6%) from 2004 to 2011.

The growth in the Chinese wind power generation market brought in other ripple effects; top-ranking wind turbine manufacturers in China became global top 3 power turbine companies, wind power generation products of 12 Chinese companies penetrated the global market, and five companies constructed wind power plant in other counties.

As many companies enter the wind power industry with the quantitative expansion in China, however, competition between the companies is becoming fierce, leading to excess production capacity. This brought about a rapid drop in the prices of wind power products, deteriorating profitability of the companies. In addition, it is expected the Chinese wind power industry will supply 70GW (15GW each year) to the domestic market for the next five years. In this report as well, it is forecasted that the amount of newly installed wind power systems each year will remain in 16.5GW from 2012 to 2015, starting with 17.6GW in 2011.

Although China is expected to maintain its position as a world's wind power leader for a while, Chinese wind turbine manufacturers are looking to overseas markets due to the increasingly competitive domestic market.

Existing companies and new comers in the power generation industry should closely monitor the current situation and changes in the Chinese wind power industry. Additionally, it is very important to comprehend business strategies of competitors to gain advantage in competition with Chinese companies in overseas markets as well as China.

To analyze the wind power generation industry and market forecast, this report examines:

- Roadmap for national policies and technology development to promote wind power generation

- Analysis of profitability of 100MW onshore and offshore wind farms

- Business trend of 7 wind turbine manufacturers and 40 component companies

- Analysis of the supply chain of 7 major wind turbine manufacturers

- Wind power installation market forecast by region, turbine capacity, and onshore/offshore (2004-2015)

- Production capacity/production of wind turbine manufacturers and key component manufacturers, prices of Chinese/foreign products, and sales forecast. (2004~2015)

Contents

1. ENERGY POLICY

1.1. Energy Consumption Status and Energy Demand Outlook

1.1.1. Energy Consumption Status (2004~2011)

1.1.1.1. Energy Consumption Status

1.1.1.2. Oil Price History

1.1.1.3. Electricity Price History

1.1.2. Energy Demand Outlook (~2050)

1.2. Nation Energy Plan

1.3. Nation Renewable Energy Plan

2. SUPPORT POLICY HISTORY FOR WIND POWER PROMOTION

2.1. Support Policy History

2.1.1. March 2004 Renewable Energy Promotion Act

2.1.2. January 2006 Renewable Energy Policy

2.1.3. August 2007 Renewable Energy Long-term Development Plan

2.1.4. December 2007 Circular Economic Law

2.1.5. August 2008 Renewable Energy Development 11th Five-Year Plan

2.1.6. October 2010 Renewable Energy Development 12th Five-Year Plan

2.1.7. October 2011 Adjusted Renewable Energy Development 12th Five-Year Plan

2.2. Renewable Energy FIT History

3. CHINA WIND ENERGY DEVELOPMENT ROADMAP 2050

3.1. Wind Energy Resource Assessment

3.2. Wind Turbines

3.3. Wind Farm Development and Construction

3.4. Wind Power Integration

4. WIND POWER RESOURCE

4.1. Overview

4.2. Wind Power Resource Potentials

4.2.1. Land-based Wind Resources

4.2.2. Near Off Shore Wind Resources

4.2.3. Wind Resources at Gigawatt-scale Wind Power Bases

4.3. Vision for Wind Power Deployment

4.3.1. Strategic Objectives

4.3.2. Scenarios

5. PROFITABILITY(EQUITY IRR) ANALYSIS FOR 100MW WIND POWER PLANT

5.1. On Shore Wind Power Plant

5.2. Off Shore Wind Power Plant

6. WIND POWER CERTIFICATION

6.1. CGC(China General Certification Center) for Wind Power

6.2. China Top 20 Wind Turbine Makres' Certification Acquisition Status

7. POWER GRID CONNECTION ISSUES IN CHINA

7.1. Issues at an Institutional and Policy Level

7.2. Technical Issues

7.3. Policy Solutions for Difficult Wind Power Connections

7.4. Technical Solutions to Wind Power Grid Connections

8. WIND TURBINE AND KEY COMPONENT MAKERS' BUSINESS & TECHNOLOGY DEVELOPMENT TRENDS

8.1. Wind Turbine

8.1.1. Sinovel

8.1.2. GoldWind

8.1.3. Dongfang Electric Corporation (DEC)

8.1.4. Guodian United power

8.1.5. Mingyang Wind Power

8.1.6. XEMC Wind power

8.1.7. Shanghai Elec

8.2. Blade

8.2.1. Lianyungang Zhongfu Lianzong Composites Group Co.,Ltd

8.2.2. Sinoma Wind Power blade Co.,Ltd

8.2.3. LM Wind Power

8.2.4. Guodian United power

8.2.5. Tianjin Dongqi Wind Turbine Blade Engineering Co., Ltd

8.3. Tower

- 8.3.1. Shandong Tongli Steel Co., Ltd.?CNR?
- 8.3.2. Jiangsu Shenshan Wind Power Equipment Manufacturing Co., Ltd.
- 8.3.3. Dajin Heavy Industry Corporation
- 8.3.4. Chengxi Shipyard Co.,Ltd?CSSC?
- 8.3.5. Qingdao Pingcheng Steel Structure Co., Ltd?Shandong?
- 8.4. Generator
 - 8.4.1. Nanjing Turbine & Electric Machinery (Group) Co.,Ltd .
 - 8.4.2. Yongji Xinshisu Electric Equipment Co.,Ltd?China CNR?
 - 8.4.3. CSR Zhuzhou Electric Co.,Ltd?Hunan Direct-drive Double-fed?
 - 8.4.4. Jiamusi Electric Machine Co.,Ltd (Heilongjiang?)
 - 8.4.5. Xiangtan Electric Manufacturing Corporation Ltd (XEMC)
- 8.5. GearBox
 - 8.5.1. China High Speed Transmission Equipment Group Co., Ltd.?NGC?
 - 8.5.2. DHloDCW Group Co., Ltd?Dalian?
 - 8.5.3. CN GPOWER Gearbox Co., Ltd
 - 8.5.4. Winergy Drive Systems Ltd?Tianjin Siemens?
 - 8.5.5. Bosch Rexroth China
- 8.6. Pitch System
 - 8.6.1. DHloDCW Group Co.,Ltd.?Sinovel?
 - 8.6.2. Beijing Techwin Electric Co.,Ltd?Goldwind?
 - 8.6.3. MOOG
 - 8.6.4. SSB Wind System
 - 8.6.5. REnergy Electric Tianjin Ltd?REE?
- 8.7. Main Bearing
 - 8.7.1. SKF Group?Sweden Dalian?
 - 8.7.2. Wafangdian Bearing Group Corporation?ZWZ?
 - 8.7.3. FAG?SCHAEFFLER, Germany INA?
 - 8.7.4. TIMKEN
 - 8.7.5. Luoyang LYC Bearing Co.,Ltd?Henan?
- 8.8. Flange
 - 8.8.1. Shanxi Dingxiang Jinrui High Pressure Rings Co., Ltd.
 - 8.8.2. Shandong Iraeta Heavy Industry Co.
 - 8.8.3. Dalian PSM
 - 8.8.4. Shanxi Double Ring Heavy Machinery Co.,Ltd
 - 8.8.5. Shandong Longma Heavy Industry Group Co., Ltd.
- 8.9. Inverter
 - 8.9.1. Dalian Guotong Electric Co., Ltd.?Sinovel?
 - 8.9.2. ABB?Switzerland?
 - 8.9.3. The Switch?Finland?

- 8.9.4. Beijing Techwin electric Co.,Ltd?Goldwind?
- 8.9.5. Shenzhen Hopewind Electric Co., Ltd.

9. SUPPLY CHAIN ANALYSIS FOR CHINA TOP TIER WIND TURBINE MAKERS

- 9.1. Sinovel
- 9.2. GoldWind
- 9.3. Dongfang Electric Corporation (DEC)
- 9.4. United power
- 9.5. Mingyang Wind Power
- 9.6. XEMC Wind Power
- 9.7. Shanghai Electric

10. WIND POWER INSTALLATION MARKET STATUS AND FORECAST (2004~2015)

- 10.1. Wind Power Installation Market Status (2004~2011)
 - 10.1.1. Annual Installation Market by Total
 - 10.1.2. Annual Installation Market by Province
 - 10.1.3. Annual Installation Market by Wind Turbine Size
 - 10.1.4. Annual Installation Market by Location (On Shore, Off Shore)
 - 10.1.5. Market Share by Wind Turbine Makers
- 10.2. Wind Power Installation Market Forecast (2012~2015)
 - 10.2.1. Annual Installation Market Forecast by Total
 - 10.2.2. Annual Installation Market by Province
 - 10.2.3. Annual Installation Market by Wind Turbine Size
 - 10.2.4. Annual Installation Market by Location (On Shore, Off Shore)

11. WIND POWER VALUE CHAIN MARKET STATUS AND FORECAST (2009~2015)

- 11.1. Wind Turbine
 - 11.1.1. Production Capacity & Production Status and Forecast by Company
 - 11.1.2. Price Trends by Wind Turbine Size
 - 11.1.2.1. China Maker's Wind turbine Price Trends by Wind Turbine Size
 - 11.1.2.2. Foreign Maker's Wind turbine Price Trends by Wind turbine size
 - 11.1.3. Manufacturing Cost Analysis
 - 11.1.4. Wind Turbine Revenue Forecast
- 11.2. Blade
 - 11.2.1. Production Capacity & Production Status by Company

- 11.2.2. Price Trends by Blade Size
 - 11.2.2.1. China Maker's Blade Price Trends by Blade Size
 - 11.2.2.2. Foreign Maker's Blade Price Trends by Blade Size
- 11.2.3. Manufacturing Cost Analysis
- 11.2.4. Blade Revenue Forecast
- 11.3. Tower
 - 11.3.1. Production Capacity & Production Status by Company
 - 11.3.2. Price Trends by Tower Size
 - 11.3.2.1. China Maker's Tower Price Trends by Tower Size
 - 11.3.2.2. Foreign Maker's Tower Price Trends by Tower Size
 - 11.3.3. Manufacturing Cost Analysis
 - 11.3.4. Tower Revenue Forecast
- 11.4. Generator
 - 11.4.1. Production Capacity & Production Status by Company
 - 11.4.2. Price Trends by Generator Size
 - 11.4.2.1. China Maker's Generator Price Trends by Generator Size
 - 11.4.2.2. Foreign Maker's Generator Price Trends by Generator Size
 - 11.4.3. Manufacturing Cost Analysis
 - 11.4.4. Generator Revenue Forecast
- 11.5. Gearbox
 - 11.5.1. Production Capacity & Production Status by Company
 - 11.5.2. Price Trends by Gearbox Size
 - 11.5.2.1. China Maker's Gearbox Price Trends by Gearbox Size
 - 11.5.2.2. Foreign Maker's Gearbox Price Trends by Gearbox Size
 - 11.5.3. Manufacturing Cost Analysis
 - 11.5.4. Gearbox Revenue Forecast
- 11.6. Pitch System
 - 11.6.1. Production Capacity & Production Status by Company
 - 11.6.2. Price Trends by Pitch System Size
 - 11.6.2.1. China Maker's Pitch System Price Trends by Pitch System Size
 - 11.6.2.2. Foreign Maker's Pitch System Price Trends by Pitch System Size
 - 11.6.3. Manufacturing Cost Analysis
 - 11.6.4. Pitch System Wind Turbine Revenue Forecast
- 11.7. Main Bearing
 - 11.7.1. Production Capacity & Production Status by Company
 - 11.7.2. Price Trends by Main Bearing Size
 - 11.7.2.1. China Maker's Main Bearing Price Trends by Main Bearing Size
 - 11.7.2.1. Foreign Maker's Pitch System Price Trends by Pitch System Size
 - 11.7.3. Manufacturing Cost Analysis

11.7.4. Main Bearing Revenue Forecast

11.8. Flange

11.8.1. Production Capacity & Production Status by Company

11.8.2. Price Trends by Flange Size

11.8.2.1. China Maker's Flange Price Trends by Flange Size

11.8.2.2. Foreign Maker's Flange Price Trends by Flange Size

11.8.3. Manufacturing Cost Analysis

11.8.4. Flange Revenue Forecast

11.9. Inverter

11.9.1. Production Capacity & Production Status by Company

11.9.2. Price Trends by Inverter Size

11.9.2.1. China Maker's Inverter Price Trends by Inverter Size

11.9.2.2. Foreign Maker's Inverter Price Trends by Inverter Size

11.9.3. Manufacturing Cost Analysis

11.9.4. Inverter Revenue Forecast

12. INDEX

12.1. Figure

12.2. Table

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