

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)

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