

Wind Turbine Composites Market Forecasts to 2034 – Global Analysis By Fiber Type (Carbon Fiber Composites, Glass Fiber Composites and Other Fiber Types), Resin Type (Polyester, Vinyl Ester, Epoxy, Polyurethane and Other Resin Types), Technology, Application and By Geography

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Abstracts

According to Statistics MRC, the Global Wind Turbine Composites Market is accounted for \$9.17 billion in 2026 and is expected to reach \$18.27 billion by 2034 growing at a CAGR of 9.0% during the forecast period. Wind turbine composites are defined as the composites or components that are utilized in the production of wind turbine parts, such as blades and nacelles. The use of composites aids in the creation of lightweight, high-quality, long-lasting, corrosion-resistant components with minimal maintenance requirements. Wind turbine composites enhance turbine performance by enabling the construction of larger and more efficient blades. They contribute to the renewable energy sector's growth by improving energy capture efficiency and promoting sustainability.

According to the Ministry of New and Renewable Energy (MNRE), India has the fourth-highest wind installed capacity in the world with a total installed capacity of 39.25 GW (as of 31st March 2021) and has generated around 60.149 billion Units during 2020-2021.

Market Dynamics:

Driver:

Escalating demand for renewable energy sources

As the world intensifies efforts to combat climate change and reduce dependency on fossil fuels, wind energy emerges as a crucial component of the global renewable energy mix. The inherent environmental benefits, coupled with governmental commitments to clean energy targets, propel the expansion of wind power projects. Wind turbine composites play a pivotal role in this scenario, enhancing the efficiency and durability of turbines. Their lightweight and durable properties contribute to the construction of larger and more efficient wind turbines, meeting the rising demand for sustainable energy solutions.

Restraint:

Recycling challenges

The composite materials used in wind turbine components, often composed of fibreglass or carbon fibre-reinforced polymers, pose difficulties in recycling. These materials are complex and difficult to separate and process, which raises concerns regarding their potential effects on the environment and their sustainable disposal. These issues are made worse by the absence of standardised recycling procedures, which prevents the general adoption of eco-friendly behaviours. Therefore, there is a decreasing demand for market growth.

Opportunity:

Demand for lightweight and durable composite materials

As the wind energy sector continues to expand globally, there is a heightened emphasis on improving turbine efficiency and performance. Lightweight composites, such as fibreglass and carbon fibre-reinforced polymers, offer a strategic solution by reducing the overall weight of turbine components without compromising strength. This not only enhances energy capture efficiency but also facilitates easier transportation, installation, and maintenance. The opportunity lies in advancing research and development to create innovative composite materials that meet the industry's need for high-performance and sustainable solutions in the evolving landscape of wind energy production.

Threat:

Price volatility of raw materials

Fluctuations in the costs of essential raw materials, such as carbon fibre and resins, can impact manufacturing expenses, potentially making composite materials less cost-competitive. Sudden price increases can strain profit margins for manufacturers and may affect the overall economic viability of wind energy projects. This threat emphasises the importance of supply chain resilience, hedging strategies, and ongoing efforts to explore alternative materials or manufacturing processes that mitigate the vulnerability of the wind turbine composites market.

Covid-19 Impact

The wind turbine composites market faced challenges due to COVID-19 as the pandemic disrupted global supply chains and impacted project timelines. Lockdowns and restrictions hampered manufacturing activities, causing delays in the production and installation of wind turbines. Travel restrictions and economic uncertainties also affected investments in renewable projects. However, the crisis accelerated the focus on sustainable energy, prompting increased interest in wind power post-pandemic. The industry demonstrated resilience, with recovery driven by renewed government commitments to green initiatives and a growing emphasis on clean energy solutions.

The carbon fiber composites segment is expected to be the largest during the forecast period

The carbon fiber composites segment is estimated to hold the largest share. In wind turbine applications, carbon fiber composites are employed in components like blades and nacelles to optimize performance and longevity. Their lightweight nature allows for increased efficiency in power generation, while their robust properties withstand harsh environmental conditions. As the demand for high-performance and durable wind turbines grows, the carbon fibre composites segment continues to advance, contributing significantly to the overall innovation and sustainability of the wind energy sector.

The prepreg segment is expected to have the highest CAGR during the forecast period

The prepreg segment is anticipated to have lucrative growth during the forecast period. Prepreg refers to pre-impregnated composite fibres with a resin matrix. These advanced materials offer precise control over resin content, ensuring uniformity and superior mechanical properties. In wind turbine applications, prepreg is extensively utilized in manufacturing turbine blades. Moreover, prepregs facilitate streamlined manufacturing

processes, reducing waste and enhancing overall production efficiency. As the wind energy sector grows, the segment continues to play a vital role in advancing the technological sophistication and sustainability of wind turbine components.

Region with largest share:

Asia Pacific commanded the largest market share during the extrapolated period owing to escalating demand for clean energy sources and sustainable power generation. Countries like China and India are leading the adoption of wind energy, fostering the development of advanced composite materials for wind turbine manufacturing. The region benefits from increasing government initiatives promoting renewable energy, favourable wind energy policies, and a growing awareness of environmental sustainability. As a result, the Asia-Pacific market is poised for continued expansion, contributing to the region's transition towards greener and more sustainable energy solutions.

Region with highest CAGR:

North America is expected to witness profitable growth over the projection period. The United States and Canada are witnessing substantial growth in wind power projects, propelling the demand for advanced composite materials in turbine manufacturing. Stringent environmental regulations, government incentives, and the pursuit of cleaner energy sources are driving this surge. Furthermore, with a strong commitment to reducing carbon emissions, the region's market is poised for sustained expansion in the transition to sustainable energy.

Key players in the market

Some of the key players in the Wind Turbine Composites Market include Avient Corp, SGL Carbon SE, Toray Industries Inc, Owens Corning, Covestro AG, Gurit Holding AG, Hexion Inc, EPSILON Composite SA, Hexcel Corp, Exel Composites Oyj, Suzlon Energy Limited, Huntsman Corporation, Vestas Wind Systems A/S, Teijin Limited, TPI Composites Inc, Reliance Industries Limited, Siemens AG, Cytac Industries Inc., Royal TenCate Inc. and Gamesa Corporation Technology Inc.

Key Developments:

In May 2021, Hexcel launched a range of HexPly® surface finishing prepregs and semi@@- @@prepregs for wind turbine blades and automotive and marine

applications.

In June 2021, Evonik opened a new research and development centre in Shanghai, China. This centre will focus on developing new products and technologies for the Chinese market.

Fiber Types Covered:

Carbon Fiber Composites

Glass Fiber Composites

Other Fiber Types

Resin Types Covered:

Polyester

Vinyl Ester

Epoxy

Polyurethane

Other Resin Types

Technologies Covered:

Resin Infusion

Hand Lay-Up

Prepreg

Vacuum Injection Molding

Other Technologies

Applications Covered:

Nacelles

Blades

Tower

Hub

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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