

# The Wind Forecast – Demand Side

February 2008

## The Wind Forecast – Demand Side (new market report available)

### Analysis framework:

- Profiles
- Drivers
- Structure developments
- Challenges
- Positioning
- Consolidation
- Contracting
- Value chain

### Player profiles on

- Iberdrola, FPL, EDP, Acciona Energia, Babcock & Brown, Long Yuan Electric Power Group, ENEL, EDF, Eurus Energy, E.ON, GE Financial Services, International Power, Datang Group, CLP Guahua, Electrabel/Suez, Hua Neng, Shell Renewables, MidAmerican Energy, Vattenfall, RWE, Hua Dian, AES, Edison International, Scottish and Southern Energy, Deutsche Essent

### Market review 2007

- Country specific
- Onshore / offshore

### Updated market outlook 2008-2012

### Prices:

Personal copy (EUR 650)  
Corporate multi-user (EUR 1,600)

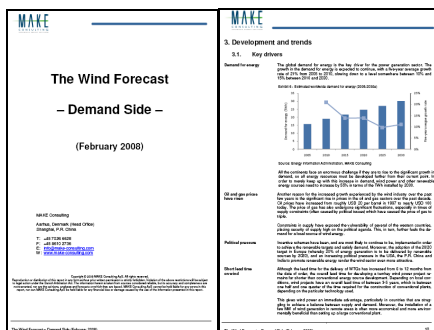
“The Wind Forecast - Demand Side” is MAKE Consulting's analysis and up-to-date snapshot of the value chain, all the key players in this chain, and how they interact and influence the market. The report reviews the main events of the past year, and in particular the key mergers and acquisitions and the way in which the various players have been involved.

Global utilities and major energy producers, which have not yet been the most active players, are expected to show signs of movement in the near future. To date, companies such as BP and Statoil Hydro have only installed an insignificant number of MW, but they have the project plans and financial backing to enter the market on a large scale if they so choose. In the same way, several utilities in the USA have the need, the portfolio and the financial backing to implement an aggressive strategy for entry into the wind market if desired.

The general trend is best summarised by the fact that large IPPs and utilities are aggressively seeking to increase their own portfolios of wind power by acquiring smaller developers. The end result will be seen in a couple of years' time, when the number of companies active in project development will be reduced, as the market is moving towards fewer, but larger, players.

When it comes to projects in the planning phase, it is not only the players in the top 25 that are conducting aggressive strategies. Companies such as BP, Noble, Invenergy, Duke and Xcel Energy are estimated to have substantial project portfolios under development, and are therefore able to make an impact, while others also are considered to be significant players due to their offshore focus, for example.

The demands facing developers have increased dramatically over the past five years. The contracting balance between the developers and the WTG manufacturers has changed most, as the wide use of framework agreements is making it more difficult to buy single WTGs. The trend is for long-term commitment between developers and WTG manufacturers, with purchase options currently running to 2012. The quantity and the delivery time have increased compared to earlier, in order to guarantee security of delivery.



## How to order...

To order The Wind Forecast – Demand Side:

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## Research subscription

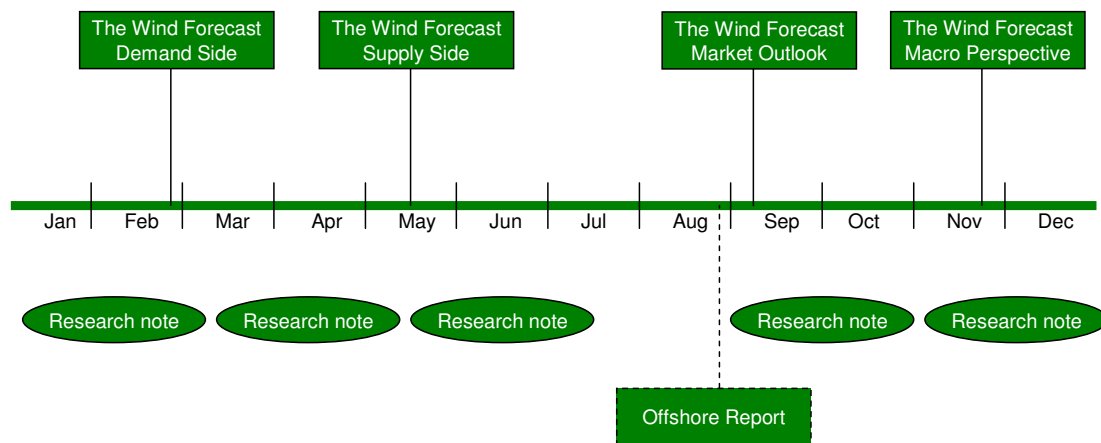
Our research brings you detailed market views, outlooks, competitive analysis, strategies, trends and perspectives through out the entire value chain. Our market reports and research notes typically provide you with detailed market analysis by country, profiles, strategies and expectations of developers, utilities, wind turbine manufacturers and component suppliers as well as trends and perspectives in the industry.

The mission is to provide a balanced data and analysis framework enabling our clients to decide upon strategic investments in order to grow profitable in this fast growing market.

A one-year research subscription package includes:

- Four market reports of “The Wind Forecast”
- Research notes on ad hoc basis
- 35% discount on other reports, including The Offshore Report

As a guideline, our research will be available as illustrated in the figure below:



### The Wind Forecast – Demand Side

...includes among others year-in-review market data, drivers and barriers for developers and utilities, trends on demand side like new players, strategies and cross-border movements. It also includes strategies, wind farm ownership tables, product portfolios, etc. for the top players on demand side. Furthermore, updated and revised country specific market forecasts are also part of the report.

### The Wind Forecast – Supply Side

...includes among others trends on supply side like sourcing, new players, supply chain development and strategies and internationalisation. It also includes strategies, market share data, performance and expectations of wind turbine manufacturers and main component suppliers. Furthermore, updated and revised country specific market forecasts are also part of the report.

### The Wind Forecast – Market Outlook

...includes among others detailed market analysis by country including historical development, legal framework and subsidy schemes, products, drivers and barriers, risk profiles, market trends and forecast. It includes detailed five and ten years market forecasts for wind turbine development and installations for more than 20 countries.

### The Wind Forecast – Macro Perspective

...includes among others competitive analysis of renewable energy vs. conventional energy including e.g. investments, costs, subsidies, OMS, capacity, drivers and barriers. Furthermore, the report includes a comparison of the different renewable energy sources. Furthermore, updated and revised country specific market forecasts are also part of the report.

### Research notes

...include detailed analysis on specific trends in industry like e.g. capacity shortages, strategic changes in competition, major activities among players, etc. Research notes can also include detailed market analysis on new emerging markets.

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