

Research note

By MAKE Consulting

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Asian Exports to Bolster U.S. Supply Chain

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The U.S. manufacturing base for the wind power industry has grown steadily over the past few years and will continue to grow, due in part to a new focus on job creation and a re-tooling of dormant manufacturing infrastructure. Despite this growth, however, the U.S. manufacturing base cannot satisfy current and future demand alone and must import a significant percentage of components. As components become larger and transportation more expensive, low cost options available in Asia may challenge the historic dependence on imports from Europe.

- Current manufacturing base in the U.S. insufficient to meet near to medium term demand
- Steady long-term growth of wind power projected in the U.S.
- Obama administration emphasizes job creation and manufacturing revitalization
- Europe to fade gradually as an export hub
- Manufacturing base in Asia ramping up

As the U.S. market recovers from the economic downturn and growth rates escalate, the supply chain will likely shift albeit gradually. Components will continue to be imported from Europe to the U.S. market in the near to medium term. Although the U.S. supply chain will further solidify, the market will also depend increasingly on Asian-manufactured components to meet demand. The growth in manufacturing in Asia will alter supply chain dynamics and alleviate U.S. dependence on European imports. By the end of 2012, we expect the Asian market to be a primary exporter of components to the U.S. market. The U.S. supply chain will be more developed, but still reliant on imports from overseas.



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 Denmark

USA office
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 USA

P.R. China office
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Headquarters
Bushørvænget 129
DK-8270 Højbjerg
Denmark

USA office
117 N. Jefferson Street, Suite 400
Chicago, IL 60661
USA

P.R. China office
The Exchange Tower, 2916
No. 189 Nanjing Road, Tianjin 300051
P.R. China

info@make-consulting.com
www.make-consulting.com