

# Market Report

By MAKE Consulting

October 2010

## Demand Side

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**(Price: EUR 1,500)**

Global demand for wind power achieved a new high mark in 2009, with nearly 33 GW installed. This represented an annual growth of 27% and increased cumulative installations of more than 150 GW worldwide. Demand was fairly well distributed across the main markets – the Americas, the Asia Pacific, and Europe – as each market accounted for almost a third of new grid-connected capacity in 2009.

Three traditional leaders – Iberdrola Renovables, NextEra Energy, and EDPR – eclipsed the 6 GW mark in total installations under ownership in 2009. Guodian/China Longyuan and Acciona Energia rounded out the top five positions. Nearly half of the top 25 owners of wind power boasted over 2 GW under ownership through last year, a group expected to grow by the end of 2010. Overall, the top 25 owners of wind power accounted for 65% of added installations in 2009.

European utilities and IPPs maintained their predominance in the top 25 global rankings, holding five of the top ten positions and ten positions overall. The Americas region boasted six companies in the top 25 global ownership rankings, with NextEra Energy's 7,544 MW leading the way. TransAlta, based in Canada, represents the only non-U.S. based company in the Americas group. Market growth in China has altered the composition of the top 25 global owners of wind power. Of the nine companies from the Asia Pacific region, seven of them are Chinese, the most of any country. The seven Chinese companies in the top 25 added over 1 GW on average in 2009. These additions enabled the Chinese companies to leapfrog companies from Europe and the Americas in the rankings. Tremendous growth in the Chinese market will inevitably elevate Chinese companies in the rankings over the next few years.

This 70-plus page report provides the reader with an overview of global and regional demand for wind power. The report includes analysis of both current and expected market conditions in the three main markets to help the reader gain a better understanding of present market dynamics. To this end, top owners of wind power assets are ranked and evaluated. A detailed appendix offers profiles and market overview of the world's leading demand side companies.

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Project Pipelines		Project Pipeline	Project Pipeline	Project Pipeline
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