

Market Report

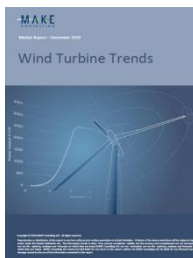
By MAKE Consulting

December 2010

Wind Turbine Trends

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(Price EUR 1,500)

Never before has technology been as critical in the wind industry as it is today. The global wind market is set to undergo significant changes as growth in traditional wind markets stalls and emerging markets drive growth in the industry. Regional market drivers will dominate the manner in which turbine vendors forward technology initiatives and how major supply chain players craft their multigenerational product plans (MGPP). A one-size-fits-all strategy is simply not suitable in a closely connected global wind space.

In an increasingly competitive marketplace, wind turbine providers endeavor to improve their cost positions in an effort to cope with lower pricing power. Vendors are seeking to increase the performance of their existing platforms in an effort to salvage profitability. Evolutionary design practices and value engineering activities are pushing the envelope of existing turbine platforms. Rotor programs have been the most evident aspect of this trend, but turbine providers have also introduced new technologies such as hybrid towers and compact drivetrains. Heavy focus has also been placed on the improvement of gearbox reliability and longevity. Direct-drive permanent magnet generators are also being deployed, which reduce lifecycle costs through the avoidance of gearbox maintenance and replacement. As the industry moves toward mass production of multi-megawatt systems, technology improvements will be necessary to reduce the cost of energy and improve the overall competitiveness of wind.

Wind turbine OEMs have expanded their product portfolios significantly over the past three years and, as a result, have produced wind systems tailored to unique project conditions around the world. The primary focus of turbine designers in the coming years will focus on capitalizing on market opportunities in less developed wind regimes. The most recent turbine programs to commercialize illustrate this trend.

This 55-plus page report provides the reader with an overview of wind turbine technology trends. The report includes comprehensive analysis of the major components of commercial and utility-scale wind turbines and focuses on design trends and the presence of turbine manufacturers in various core technologies. Finally, appendices provide product and technology profiles for top fifteen manufacturers and 2009 technology mix for the regional markets.

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	Q1	Q2	Q3	Q4
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Research Notes	Min. Two Research Notes	Min. Two Research Notes	Min. Two Research Notes	Min. Two Research Notes
Flash Notes	Min. Five Flash Notes	Min. Five Flash Notes	Min. Five Flash Notes	Min. Five Flash Notes
Forecasts	Annual/Semiannual/ Quarterly	Quarterly	Semiannual/ Quarterly	Quarterly
Project Pipelines		Project Pipeline	Project Pipeline	Project Pipeline
Policy Event Horizons		Policy Event Horizon		Policy Event Horizon

Annual publishing plan is tentative and subject to change

Market Reports are 40-60 pages of high quality industry forecasts, trend spotting and analysis, giving the reader a detailed insight into the demand side, the supply side, and wind power development in a range of countries as well as current wind turbine trends. Our market reports are published four times a year.

Business Studies are 60-100 pages detailed in-depth strategic market studies of key segments of the wind industry. In 2010 the business studies will focus on the US-, offshore,- and China wind power markets.

Research Notes are 10-20 pages of comprehensive analysis of specific trends in the industry. They are published 8 times a year and cover topics such as capacity shortages, order announcements, emerging markets, policy changes and strategic changes in the competitive landscape etc.

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Market forecasts and data are published annually, bi-annually and quarterly depending on subscription level and include forecasts of new installations and accumulated MWs on a 5 year scale divided on specific regions and on a global basis.

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