

# Research Note

By MAKE Consulting

March 2011

## Wind Turbine OEM Market Share 2010

### Contents

- **Global overview**
  - Market share comparison
  - Regional split by wind turbine OEMs
  - YoY changes
  - Offshore split
- **European overview: (Germany, Spain, France, UK, Italy, Sweden, Poland, Romania)**
  - Market share comparison
  - Country vice split by wind turbine OEMs
  - YoY changes
- **American overview: (U.S., Canada, Brazil, Mexico)**
  - Market share comparison
  - Country split by wind turbine OEMs
  - YoY changes
- **Asia Pacific overview: (China, India, Japan, Australia)**
  - Market share comparison
  - Country split by wind turbine OEMs
  - YoY changes

The remarkable growth in China had a significant impact on global market share positioning as most non-Chinese wind turbine OEMs were unable to capitalize on growth in this market. This created considerable competition particularly at the top of the rankings where only two percentage points separate the top four turbine OEMs. Despite this challenge, Vestas maintained its leading market position in 2010 based on the strength of its global install activity.

After making a strong entrance into the top five rankings in 2009, Chinese wind turbine OEMs – Sinovel and Goldwind – continued to climb up the rankings and both placed in the top four. Chinese wind turbine OEMs accounted for four of the top ten and seven of the top fifteen positions in the 2010 rankings. For comparison, European wind turbine OEMs held six positions in the top fifteen rankings in 2010.

A 44% drop in new capacity in the U.S. negatively impacted turbine OEMs whose global position depends on success in this market. GE rebounded in the U.S. with a higher market share than in 2009, but market contraction impacted its global position and Sinovel leapfrogged it for the number two position globally. Siemens recorded a strong year in North America, which helped elevate it to the second position in the U.S. and in Canada. Vestas's U.S. market share eroded significantly in 2010 due to low order activity in previous years, a trend shared by other turbine OEMs as the market stalled.

The top four turbine manufacturers in Europe held their positions in 2010 with GE making the biggest YoY improvement in the top ten. European turbine OEMs also accounted for 75% of installations offshore in 2010 led by Vestas and Siemens, which boosted their market positions.

This Research Note provides analysis and market share ranking of the wind power industry's leading turbine OEMs. A comprehensive analysis is provided globally, regionally, for the offshore segment, and at the country level for sixteen countries.

**THIS RESEARCH NOTE IS AVAILABLE TO SUBSCRIBERS TO OUR EXTENDED AND PREMIUM RESEARCH SUBSCRIPTION PACKAGE**

See the next pages for further information about our research subscription

### MAKE Consulting

Headquarters  
Bushøjvænget 129  
DK-8270 Højbjerg  
Denmark

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

USA office  
225 Franklin Street, 26th Floor  
Boston, MA 02110  
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

T: +45 7026 6628

T: +1 312-441-9590

T: +1 978 448 3186

T: +86 22 2318 5066

## Research Products

Clients subscribing to our research packages receive a range of market reports, business studies and research notes, up-to-date market forecasts and data, flash notes and ad-hoc analyst presentations.

Our research provides organizations around the world with detailed insight into the market's current technological, regulatory and competitive situation, putting facts into perspective by analyzing trends and making projections about the future.

MAKE's research is an essential market intelligence tool for the entire firm:

- Reports and forecasts that give analysts the data they need
- Research to help drive successful program decisions
- C-level briefs to ensure business leaders have the latest information

As a guideline, our research is published as illustrated in the figure below:

	Q1	Q2	Q3	Q4
Market Reports	Market Outlook	Supply Side	Demand Side	Wind Turbine Trends
Business Studies		U.S. Wind Power	Offshore Wind Power	China Wind Power
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, 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 2011 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.



Adding value to your renewable energy business

### MAKE Consulting

**Headquarters**  
Bushøjvænget 129  
DK-8270 Højbjerg  
Denmark

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

**USA office**  
225 Franklin Street, 26th Floor  
Boston, MA 02110  
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

T: +45 7026 6628

T: +1 312-441-9590

T: +1 978 448 3186

T: +86 22 2318 5066

**Flash Notes** are 1-2 pages of instant expert responses to important events. They are published ad hoc and cover topics such as M&A activities, major contracts, product launches, policy changes etc. Flash Notes are published minimum 20 times a year.

**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.

**Project Pipelines** offer an overview of the current project pipelines in selected regions and is published with reference to the business studies.

**Policy Event Horizons** are published bi-annually and provide updates on upcoming legislative events in key markets including potential outcomes.

**Analyst Presentations** are up-to-date insight from MAKE analyst presentations held at conferences and industry events around the globe.

	Basic	Extended	Premium
Market Reports	✓	✓	✓
Annual Forecasts	✓	✓	✓
Analyst Presentations	✓	✓	✓
Business Studies		✓	✓
Semiannual Forecasts		✓	✓
Research Notes		✓	✓
Business Studies in PPT Format			✓
Quarterly Forecasts			✓
Flash Notes			✓
Semiannual Policy Horizons			✓
Project Pipelines			✓
Prices (EUR) Corporate/Personal	4,000 / 2,500	9,500 / 6,500	11,500 / 7,500

Adding value to your renewable energy business



**MAKE Consulting**

**Headquarters**  
 Bushøjvænget 129  
 DK-8270 Højbjerg  
 Denmark

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

**USA office**  
 225 Franklin Street, 26th Floor  
 Boston, MA 02110  
 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

T: +45 7026 6628

T: +1 312-441-9590

T: +1 978 448 3186

T: +86 22 2318 5066

## How to order...

### To order our research:

- Fill in this order form and fax it to  
DK: +45 8610 2736  
U.S.: +1 312 441 9591  
China: +86 22 2318 5001
- Order online at  
www.make-consulting.com
- Call us on  
DK: +45 7026 6628  
U.S. (Boston): +1 781 791 5045  
U.S. (Chicago): +1 312 441 9590  
China: +86 22 2318 5066
- Send an e-mail to  
info@make-consulting.com

## Order form

Product	Select product
Premium Subscription – Corporate (EUR 11500 + VAT)	
Premium Subscription – Personal (EUR 7500 + VAT)	
Extended Subscription – Corporate (EUR 9500 + VAT)	
Extended Subscription – Personal (EUR 6500 + VAT)	
Basic Subscription – Corporate (EUR 4000 + VAT)	
Basic Subscription – Personal (EUR 2500 + VAT)	
Single Market Report (EUR 2500 + VAT)	
Business Study (EUR 2500 + VAT)	

### Key:

\* A single user subscription package is solely intended for one person

\*\* A corporate, multi-user subscription package can be distributed throughout an organization

## Subscriber details

Name:

Company (write "private" if not applicable):

Address line 1:

Address line 2:

Address line 3:

ZIP/post code:

Country:

Telephone:

E-mail:

VAT/TVA/MWST no. (for EU-based companies only):

Adding value to your renewable energy business

**MAKE**  
CONSULTING

### MAKE Consulting

#### Headquarters

Bushøjvænget 129  
DK-8270 Højbjerg  
Denmark

T: +45 7026 6628

#### USA office

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

T: +1 312-441-9590

#### USA office

225 Franklin Street, 26th Floor  
Boston, MA 02110  
USA

T: +1 978 448 3186

#### P.R. China office

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

T: +86 22 2318 5066

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