

Flash Note

By MAKE Consulting

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Non-Chinese Turbine OEMs Struggling in China

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Non-Chinese wind turbine OEMs accounted for less than 11% of the nearly 19GW installed in China in 2010. This marks the fourth consecutive year that Chinese wind turbine OEMs have increased their share of the China market. In order to compete with strong domestic suppliers, non-Chinese wind turbine OEMs have undertaken a number of China focused initiatives to overcome market barriers and sustain growth.

The China focused strategies of Vestas and Gamesa have yielded limited success, enabling top ten rankings for annual market share in China in 2010, the only non-Chinese turbine OEMs to do so. The two OEMs installed more than three times the capacity installed by the other major non-Chinese turbine OEMs combined. Other non-Chinese turbine OEMs have chosen alternate strategies, such as pursuing joint ventures with state-owned enterprises. A direct connection to a domestic company could help improve order intake activity and bolster overall market viability.

The Flash Note highlights the importance of the Chinese market for global market share positioning and examines the different strategies non-Chinese turbine OEMs have pursued in the market.

See the next pages for further information about our research subscription

Adding value to your renewable energy business

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	Q1	Q2	Q3	Q4
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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

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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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