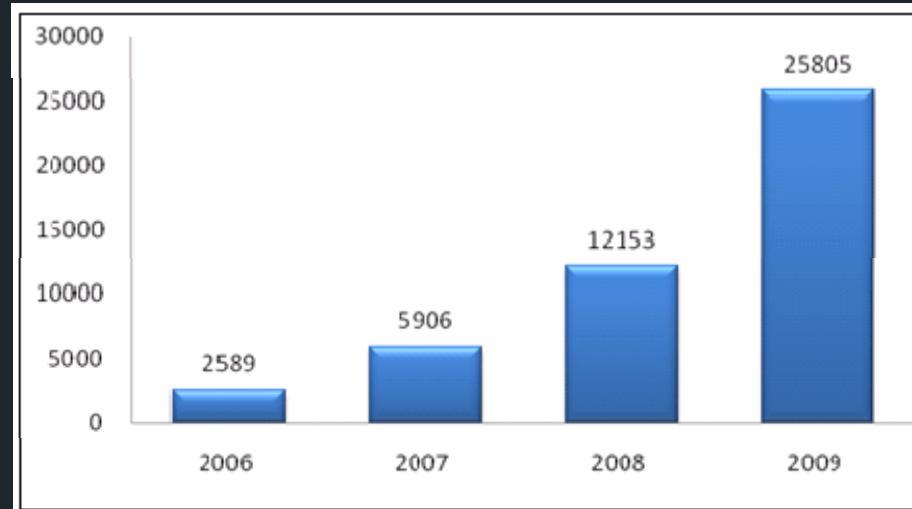


China Wind Power Equipment and Parts Industry Report, 2009-2010



In 2009, 10,129 sets of wind turbines were installed, totaling 13,803.2 MW, up 124% over the previous year. By the end of 2009, China's total installed wind turbines reached 21,544, amounting to 25,805.3 MW, up 114% over the same period of the previous year. There had been more than nine provinces with the installed capacity exceeding 1,000 MW in Mainland China, including four provinces with the installed capacity exceeding 2,000 MW apiece, namely Inner Mongolia (9,196.2MW), Hebei (2,788.1MW), Liaoning (2,425.3 MW) and Jilin (2,063.9 MW).

Accumulated Installed Capacity of China's Wind Power Industry, 2006-2009



Source: Chinese Wind Energy Association

In terms of parts, China had built a production system of major parts including blade, gearbox, generator and pylon, which had progressively narrowed the gap between the supply and demand of such key parts as blade, generator, gearbox and wheel hub to some extent, but still failed to bridge the supply-demand gap for bearing and control system.

Typical Manufacturers of Wind Power Parts in China, 2009

Parts	Typical Manufacturers
Blade	Sinomatech Wind Power Blade, Zhuzhou Times New Material Technology, Zhonghang Huiteng Windpower Equipment, Lianyungang Zhongfu Lianzhong Composites Group, etc.
Gearbox	Nanjing High-Speed & Accurate Gear Group, Chongqing Gearbox, Huangzhou Advance Wind-Power Gearbox, etc.
Bearing	Tianma Bearing, XEMC-TIMKEN, SKF, etc.
Variable-frequency Drive (VFD)	ABB, Emerson, Vacon, JZE, etc.

Source: ResearchInChina

It is estimated that Chinese equipment manufacturers will vigorously march toward the wind power parts industry for more profits. Their entry can reduce the equipment production cost while effectively reducing the parts supply pressure. Thus far, enterprises including Dongfang Electric Corporation, Sinovel, Shanghai Electric and Xiangtan Electric Manufacturing Corporation have expanded their presence to the upstream of the industry chain, including the parts industry covering blade, foundry, bearing, wheel hub and electric motor.

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