



# **China Wind Power Equipment and Parts Industry Report, 2010-2011**

**May 2011**

## ***This report***

- ◆ **Analyzes the China wind energy industry policy.**
- ◆ **Focuses on the operation of China wind power industry and wind power equipment industry.**
- ◆ **Highlights the operation of key enterprises of wind power industry.**

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## Abstract

In 2010, 12,904 sets of wind turbines were installed in China, totaling 18,927.99 MW which was the top one around the world, up 37.1% over 2009. Driven by the rapid development of wind power industry, the wind power equipment industry of China presented vigorous growth. The manufacturing capability of wind power equipment had reached 27 GW in China by the end of 2010, and hopefully it will enlarge to 32.6 GW in 2011.

The manufacturers of wind turbine generator mainly consist of domestically-funded companies and foreign-funded counterparts. Key domestic manufacturers including Sinovel, Goldwind, and Dongfang Electric Corporation, which enjoyed 56.8% of the total market share of newly-added installed capacity. Regarding foreign-funded companies, VESTAS, GAMESA, GE, and Suzlon together occupied 10% of the market share in China in 2010.

Key parts of a wind turbine generator include blade, gearbox, electric motor, bearing, and converter. Among them, with thorough supporting system, blade, gearbox and electric motor enjoy relatively high localization, whereas the markets of bearing and converter are still dominated by foreign-funded companies who master the major techniques.

### Typical Manufacturers of Wind Power Equipment in China, 2010-2011

| <i>Wind Power Equipment</i> | <i>Typical Manufacturers</i>   |
|-----------------------------|--|
| <b><i>Turbine</i></b>       | <i>Sinovel, Goldwind, Dongfang Electric, VESTAS, GAMESA, etc.</i>  |
| <b><i>Blade</i></b>         | <i>Sinomatech Wind Power Blade, Zhuzhou Times New Material Technology, AVIC Huiteng Windpower Equipment, Lianyungang Zhongfu Lianzhong Composites Group, Tianjin Dongqi Wind Turbine Blade Engineering, etc.</i> |
| <b><i>Gearbox</i></b>       | <i>Nanjing High-Speed &amp; Accurate Gear Group, Chongqing Gearbox &amp; Machinery, Hangzhou Advance Gearbox Group, Ningbo Donly Transmission Equipment etc.</i>   |
| <b><i>Generator</i></b>     | <i>XEMC Windpower, Zhuzhou CSR Electric, Yongji Xinshisu Electric Equipment, etc.</i>  |
| <b><i>Bearing</i></b>       | <i>SKF, Tianma Bearing, Luoyang LYC Bearing, etc.</i>  |
| <b><i>Converter</i></b>     | <i>ABB, Emerson, Vacon, JZE, etc.</i>  |

Source: ResearchInChina

In respect of wind power equipment parts, blade holds the highest localization rate. AVIC Huiteng Windpower Equipment Co., Ltd boasted the largest capacity of blades in 2010, which enjoyed 10% of the market share. Its supporting manufacturers mainly include Goldwind, Dongfang Electric, Zhejiang Windey, Shanghai Electric, and XEMC Windpower etc. Besides, other competitive peers cover Sinomatech Wind Power Blade, Zhuzhou Times New Material Technology, and Lianyungang Zhongfu Lianzhong Composites Group. Due to the low technical threshold, the wind blade industry will be faced with overcapacity caused by the numerous new entrants.

The market concentration of gearbox is relatively high. The market shares are mostly grabbed by Nanjing High-Speed & Accurate Gear Group, Chongqing Gearbox & Machinery, and Hangzhou Advance Gearbox Group, etc., of which Nanjing High-Speed & Accurate Gear amid takes a lion's share. Its clients include China-based Goldwind, Sinovel, Dongfang Electric, Zhejiang Windey, Huayi Electric, Shanghai Electric, and overseas GE, Nordex, Repower, Alstom.

Apart from blade and gearbox, the report also conducts in depth analysis of generator, bearing, and converter; summarizes the development status and capacity plans of key manufacturers in wind power industry; and forecasts the prospect of wind power and wind power equipment Industries in the future.

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