



China Wind Power Equipment and Parts Industry Report, 2011-2012

May 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include China Wind Energy Association and European Wind Energy Association etc.

Abstract

The flying capacity expansion of wind power equipment manufacturers in recent years has caused increasingly intense competition; in 2011, Chinese wind power equipment manufacturers witnessed decline in profit to varying degrees.

Among equipment manufacturers, in 2011, Goldwind Science & Technology Co., Ltd. reached net income of RMB607 million, a YoY decline of 73.5%; Sinovel Wind Group's net income dropped 72.8% YoY to RMB776 million. As for wind power equipment parts manufacturers, wind turbine blade maker Sinoma Science & Technology Co., Ltd. realized net income of RMB121 million in 2011, down 31.7% YoY.

Not just Chinese manufacturers, global wind power equipment manufacturers were barely satisfactory in terms of performance for 2011. For example, VESTAS, the world's largest wind power equipment maker, faced net loss of €166 million in FY2011, the first annual loss since 2005.

Confronted with such a situation, Chinese wind power equipment companies have made strategic adjustments to improve corporate performance, mainly through two ways. First, to transfer from only focusing on equipment installation quantity to increasing R&D investment and supporting the projects with higher gross margin. Sinovel Wind Group, for example, improved R&D investment in large-capacity wind turbine generators; currently, its 3MW, 5MW and 6MW large-capacity units have witnessed a substantially enhanced proportion in the order structure. Second, to actively expand overseas markets.

Wind Turbine Export of China's Major Wind Power Equipment Manufacturers, 2011

Company	Export		Export Destination
	Number of Units	Capacity (MW)	
Goldwind Science & Technology	124	189	U.S., Ecuador, Ethiopia
United Power	6	9	U.S.
XEMC Windpower	1	5	Netherlands
CSIC (Chongqing) Haizhuang Windpower Equipment	2	4	U.S.
Sany	6	12	U.S.
Huayi	2	1.56	Kazakhstan
Total	141	220.6	

Source: Chinese Wind Energy Association, China Wind Power Equipment and Parts Industry Report, 2011-2012

China Wind Power Equipment and Parts Industry Report, 2011-2012 mainly covers the following content:

- ※ Overall development of global wind power industry and major countries such as Germany, Spain, the United States and Denmark;
- ※ Analysis on China wind power industry policies, market size and offshore wind power development;
- ※ Overall development of China wind power equipment industry, market structure, import & export, regional development, as well as analysis of leading vendors.
- ※ China wind power equipment parts industry development and regional development;
- ※ Development status of wind turbine blade, gear, generator, bearing and convertor, as well as corresponding vendors.

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