



Global and China Wind Power Converter Industry Report, 2014-2018

Feb. 2015

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

As one of key components of a wind generating set, the wind power converter accounts for 17.9% of costs of wind power equipment automation products. It can optimize the operation of wind power system, improve the efficiency of wind turbine, reduce power loss, and raise utilization of wind energy.

In 2014, the global installed wind power capacity increased by 47.3GW, up 33.9% from a year earlier. In particular, China contributed 17.7GW, a 9.6% rise year on year, ranking the world's first for five consecutive years.

Driven by the resumption of offshore wind power projects in August 2013 and the State's support for wind power industry, the output value of China's wind power converter industry amounted to RMB5.8 billion in 2014, up 11.5% from a year earlier. The demand was 10,727 sets, rising by 14.7%, year on year.

At present, the 1.5MW and 2MW wind power converters are widely used in the market, with the total demand for both accounting for more than 80%. In the future, as offshore wind power expands, the industry's R&D focus will be shifted to 5MW-10MW wind power converters.

Now that China's wind power industry started relatively late, the domestic wind power converter market was monopolized by the foreign players like ABB, Emerson, and Siemens. In contrast, the Chinese enterprises such as Sungrow Power Supply, Hi-Tech Control, Zhuzhou CSR Times Electric occupied a mere 5% market share.

ABB: In 2014, the company released a new air cooled doubly-fed wind power converter, targeting China's onshore and offshore utility-scale wind turbines, with the power range of 1.5MW-2.2MW.

Emerson: In October 2014, WinTrust series 2MW doubly-fed wind power converter (air cooled) products won the bid for the Yunnan Huadian's Daheishan Project; in January 2015, WinTrust series 2MW doubly-fed wind power converter (water cooled) products won the tender for Huadian Anhui's Wuwei Project.


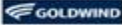








































Sungrow Power Supply: in early 2014, the company completed a 600,000 kw/a wind power converter technological transformation project, including a 400,000 kw/a full-power wind power converter capacity and 200,000 kw/a doubly-fed wind power converter; in October 2014, the company launched a full-power wind power converter for the ≥ 5 MW offshore wind power turbine unit.

Hi-Tech Control: In recent years, the company has aggressively developed wind power converters. In 2014, it developed 5.5MW WINGREEN high-voltage high-power offshore wind power converter; in 2015, it will develop 3.0MW full power (liquid cooled) wind power converter.

Global and China Wind Power Converter Industry Report, 2014-2018 by ResearchInChina is primarily concerned with the following:

- Status quo and competitive landscape, etc. of global wind power converter market;
- Development environment, market size, competitive landscape, etc. of China's wind power converter industry;
- Market size and competition pattern, etc. of IGBT and relay, etc. in China and the World;
- Market size, market structure, imports and exports, competition pattern, etc. of installed wind power in China and the World;
- Operation and revenue structure of 8 foreign wind power converter manufacturers and their layout in China;
- Operation, revenue structure, competitive edges, etc. of 16 Chinese wind power converter manufacturers.

Wind Power Converter Capacities and Accounts of China Main Manufacturers, 2015

Manufacturers	Capacity (Units per year)	Key Accounts
	5,000	    
	2,000	  
 禾望电气	1,800	     
	1,300	  
	1,000	     
	1,000	  
 HTE 海博顿	1,000	  
	600	 
 JZC 际华集团	600	 

Source: Global and China Wind Power Converter Industry Report, 2014-2018; ResearchInChina

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