

Global and China Wind Farm Operation and Maintenance Industry Report, 2015-2018

Dec. 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

In 2014, the global wind farm O & M market size hit USD9.25 billion, representing a year-on-year growth rate of 25.8%; by 2018, the market size is expected to reach USD13.78 billion. The mainstream onshore wind farm O & M market seized the share of 90.2% in 2014, much higher than the rest offshore wind farm O & M market. With the accelerating construction of offshore wind power, the global offshore wind farm O & M market is expected to grow at above 20% in 2015-2018.

China ranks first worldwide in terms of wind farm O&M market size. In 2014, the country achieved USD2.18 billion, accounting for 23.6%. Since the warranty period of a large number of wind turbines made in 2009 is approaching, China's wind farm O & M market size will surge to USD3.512 billion by 2018.

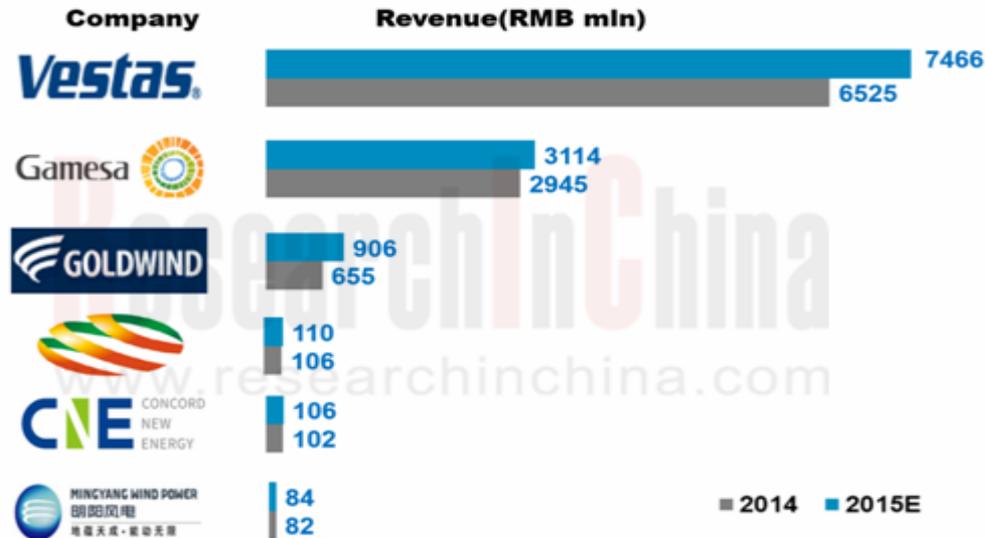
At present, players in the Chinese wind farm O&M market can be divided into three main types: wind turbine manufacturers, wind farm developers and third-party O&M companies. In 2015, wind farm developers enjoy the lion's share --74.6%, followed by wind turbine manufacturers with 14.8%. Third-party O&M companies have a relatively small scale owing to technical barriers.

Concord New Energy is a major wind farm developer in China. Its wind farm O & M business is operated by its subsidiary Beijing Concord O & M Wind Power Technology Co., Ltd. with five maintenance bases. In the first half of 2015, the company completed 39 wind farm O & M projects, signed 11 scheduled inspection service contracts and 10 preventive service contracts.

Goldwind as China's largest wind turbine manufacturer assigns its subsidiary China Tianyuan New Energy Technology to conduct wind farm O & M business. As of the end of August 2015, it had provided O & M services and technical support for 17,000 wind turbines and more than 500 wind farms.

East Environment Energy, a key third-party O&M company, has set up an intelligent energy O & M service center to monitor wind farms in real time. In the first half of 2015, the company's wind farm O & M revenue amounted to RMB37.358 million, up 3% year on year.

Wind Farm O&M Revenue of Major Global and Chinese Enterprises, 2014-2015



Source: Global and China Wind Farm O&M Industry Report, 2015-2018; ResearchInChina Note : EUR1=RMB6.76860

Global and China Wind Farm O&M Industry Report, 2015-2018 by ResearchInChina focuses on the followings:

- Global wind power installed capacity and distribution; China's wind power installed capacity, regional structure, offshore wind power development and corporate structure;
- Global wind farm O & M market size and geographical distribution; development of European wind farm O & M market;
- Chinese wind farm O & M market size, cost analysis and competitive landscape;
- Operation and development in China of 5 major global wind farm O & M companies;
- Operation and development strategies of 11 major Chinese wind farm O & M companies.

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