



International Trade Fair
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WindEnergy Study 2006
Strong growth forecast for the global wind energy market
Addition of 151 000 MW worldwide by 2014

WindEnergy – International Trade Fair
at the Hamburg Fair site from 16 to 19 May 2006

WE12, 7 March 2006

The international wind energy industry is expecting continued strong growth in the coming years – with wind turbines having total capacity of some 210 000 MW installed by 2014. At present there are a total of 59 000 MW on stream. So the growth forecast up to 2014 is about 151 000 MW. That is one of the findings of the WindEnergy Study 2006, presented by Hamburg Messe in Hamburg today, in the run-up to the leading international event WindEnergy – International Trade Fair. The German Wind Energy Institute (DEWI) surveyed companies active in wind energy on behalf of Hamburg Messe to get their assessments of the market, thus updating the second WindEnergy Study conducted in 2004. The premier international event will take place in Hamburg from 16 to 19 May 2006, with expected attendance by more than 400 exhibitors from all over the world.

The international wind energy market, which showed growth rates in 2005 of 16% in Europe, and as much as 73% outside of Europe, will continue to boom, so respondents expect. They forecast installed power of some 77 000 MW in Europe in 2010, and as much as 111 000 MW in 2014. “The projections in the WindEnergy Study show that wind energy is well underway to becoming a main energy source in Europe,” says Christian Kjaer, CEO of the European Wind Energy Association (EWEA). “The only way for Europe to secure a truly indigenous, sustainable and affordable energy supply that also addresses climate change is through large-scale renewables in combination with efficiency. Wind energy would be a cornerstone in such a policy,” says Christian Kjaer.

Taking the world market as a whole, total installed power will be up many times, from today’s level of about 60 000 MW to 210 000 MW in 2014. The key future markets identified by respondents were Germany, France, Spain and the United States.

In Germany, the WindEnergy Study shows that the onshore market will continue to grow, while the offshore market is subject to delays. Assuming no fundamental change in today’s overall positive political and economic conditions for generating electricity from wind, total installed power in Germany by 2010 will be about 23 700 MW onshore and 1300 MW offshore (compared with today’s figures of 18 428 MW onshore and 0 MW offshore). The figures for 2014 are 25 200 MW onshore and 5600 MW in the North Sea and Baltic Sea. The Federal Government’s original target



of a total of 2000 to 3000 MW installed wind farm power offshore by 2010 will no longer be feasible, according to this forecast. That is due to the delay in the start of offshore installations by at least two years to 2008. On the other hand, expansion onshore in Germany is about 8 or 9% higher in the mid term than was forecast two years ago. Looking forward to 2030, there may in fact be wind turbines with a total capacity of some 58 000 MW connected to the grid in Germany (onshore and offshore), that is enough to satisfy about 30% of German electricity demand.

“The strong expansion in the world market means that the order books of German manufacturers and equipment suppliers are now full,” said Thorsten Herdan, Managing Director of VDMA - Power Systems. “Considering that in 2005 nearly half the global market volume of over 12 billion euros was generated by German wind energy companies, the industry has outstanding prospects with the predicted future market developments.”

An important element in the timing for increased use of wind energy offshore will be when the multi-megawatt turbines are really ready for operation. The survey showed that wind turbines with a capacity of 5.1 to 6 MW will not get classification as suitable for these applications until after 2008. The sizes indicated are working test operation as prototypes at the present time. Turbines with more than 6.1 MW installed power are expected by the vast majority of respondents not to be completely developed and ready for operation until after 2010. Use of the 5 MW class or larger is generally considered necessary for far-offshore sites.

The internationally operating companies continue to regard joint ventures as the most effective way of developing new markets. However, in 2006 only 59% (versus 67% in 2004), want to tackle the international market with a joint venture. 31% prefer to set up a company locally (versus 24% two years ago). As in 2004, some 9.5% of respondents believed they could develop the foreign market purely by means of export.

The WindEnergy 2006 – International Trade Fair will be held from 16 to 19 May (10am to 6pm daily). It is completely dedicated to this growing industry, giving turbine manufacturers and equipment suppliers, planners, finance institutes, measurement and certification bodies and experts from research and development an optimal forum for further expansion of this market of the future. The official international partners of the WindEnergy are the EWEA, VDMA and DEWI. Vattenfall Europe is the principal sponsor. Support is given by further international wind energy associations in China (CREIA), Japan (JWPA), India (InWEA and IWTMA), the US (AWEA), Canada (CanWEA) and the UK (BWEA), thus covering the major export markets worldwide. In addition, the WindEnergy 2006 can draw on the know-how of the international members of its Advisory Board. Further information is available at the website www.windenergy.de.

Note for editors: A more detailed text and diagrams are available for download from the website www.windenergy.de (“Press” section). The WindEnergy Study 2006 is available on e-mail request to presse@hamburg-messe.de.

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