

GLOBAL MARKET

Stable growth offers opportunities

Although slightly fewer wind turbines were installed worldwide in 2018, stable growth is expected over the next few years. This offers opportunities: more and more German companies also operate internationally. In Europe, however, expansion declined more sharply.

Wind energy is on the road to success worldwide. According to the international umbrella organization Global Wind Energy Council (GWEC), turbines with a rated capacity of 51.3 gigawatts (GW) were installed in 2018, of which 46.8 GW were onshore and 4.5 GW offshore. Although this corresponds to a slight minus of 4 percent compared to 2017, it was nevertheless a “strong year” for the global wind industry, writes the association in its Global Wind Report.

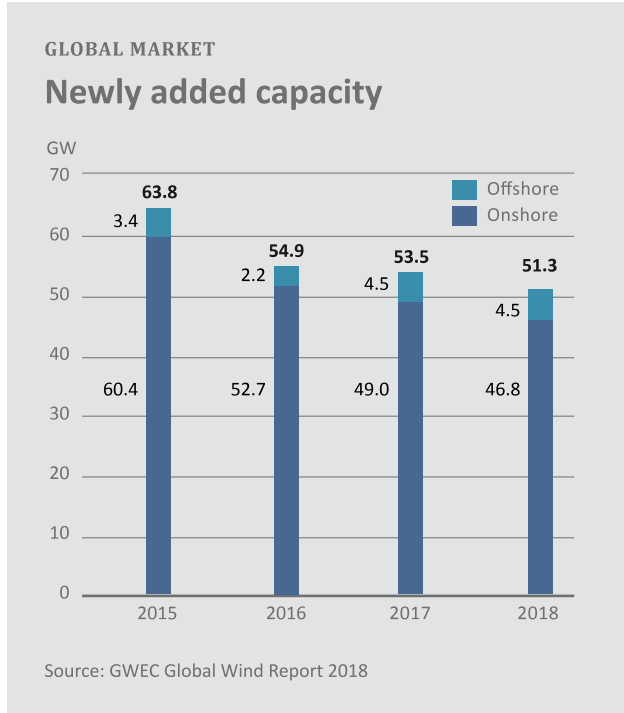
The volume installed around the world thus rises to 591 GW. According to the GWEC Report, the largest onshore markets were China and the USA, where wind capacities of 21.2 GW and 7.6 GW respectively were installed. Despite a market slump (p. 10), Germany still ranks third with 2.4 GW, followed by India (2.2 GW) and Brazil (1.9 GW). A total of 4.8 GW was installed in the growth markets of Africa, the Middle East, Latin America and Southeast Asia, making up almost 10 percent of all new installations. The authors of the analysis also expect continuous growth beyond 2018. By 2023, more than 55 GW of onshore and offshore wind will be commissioned annually. According to the GWEC, the development in Asia, Europe and North America will continue with stable volumes. Plus, “growth will come from the expansion of wind energy markets in Africa, the Middle East, Latin America and Southeast Asia.”

Construction of Johnston wind farm in Rhode Island, USA. Photo: Ulrich Mertens



Europe: wind energy will be the most important source of energy by 2030 at the latest

According to WindEurope, wind power capacity added across Europe was 11.7 GW (9 GW onshore and 2.65 GW offshore) – a decline of 32 percent compared with 2017 and the lowest figure since 2008. In addition to Germany, the United Kingdom was also responsible for the slump. Nevertheless, the two countries, along with France and Sweden, are among the main expansion drivers. Together, they account for 65 percent of new installations. “With a total rated capacity of 178.8 GW installed, wind energy remains the second largest electricity generation capacity in the EU and is expected to overtake natural gas plants in 2019”, WindEurope predicts. Findings of the umbrella association indicate that wind energy covered 14 percent of Europe’s electricity requirements. According to the “World Energy Outlook 2018” of the International Energy Agency (IEA), electricity from wind will be the most important source of energy in Europe before 2030.



Question #2: “In which foreign markets is your company particularly active and why?”



“We are constantly expanding our foreign activities, recently to the US and Taiwan, often hand in hand with our customers. Always taking into account economic significance and qualitative feasibility.”

MATTHIAS BRANDT,
Board of Deutsche Windtechnik



“Since 2010 we have been manufacturing in China directly and locally for our wind energy customers, as over the past years the nominal capacity of wind energy plants has constantly increased there.”

CLAUDIUS HIRSCH, Manager, Interhydraulik Gesellschaft für Hydraulik-Komponenten mbH



“We have excellent know-how both domestically and in the European markets, as well as in America, Australia and Asia. We support our customers with tailored financing solutions for their international projects in renewable energy and infrastructure projects.”

HEIKO LUDWIG, Global Head Structured Finance
NORD/LB



“France and Mexico – two large and very different countries with high electricity needs or a lot of catching up to do in terms of renewable energies.”

HEINER RÖGER, Manager
NOTUS energy



“France is a core market for VSB. We have built up divisions for project development for wind and PV there, as well as operational management. We are also successful as a service provider.”

MARKO LIESKE, Manager,
VSB Holding GmbH

The high level of expansion worldwide represents a great opportunity for German wind turbine manufacturers. Due to the stagnating order situation in Germany, they will have to focus more on international markets. And they have done so successfully: Nordex and Senvion, for example, reported rising incoming orders from non-European markets in 2018. Enercon also announced its intention to focus more on countries outside Germany in future. According to a survey by the renewable energies cluster Erneuerbare Energien Hamburg, almost every second (48 percent) onshore company in the Hamburg metropolitan region expects a good or very good international situation. Offshore, as many as 80 percent of the companies surveyed see “good” or “outstanding” prospects abroad.



Jeffreys Bay wind farm, South Africa, with 60 SiemensGamesa wind turbines. Photo: Paul-Langrock.de



“The international market is becoming increasingly important. We now look after a total of 4,053 MW, 1,133 of which are international in Belgium, Finland, France, Canada, Croatia, Poland and Taiwan.”

NILS BRÜMMER, Executive Director,
wpd windmanager GmbH & Co. KG



“Asian Wind OEMs ask for new Röchling solutions especially in China which is the new business opportunity for global wind. Röchling expects new demands from customers in Asia for on- and offshore wind.”

DAN MORITZ, Industry Manager Wind Power,
Röchling Industrial



“RES is represented in ten countries. This global market presence gives us more clout and our clients benefit from strong partnerships, exchange of experience and our network.”

DOMINIQUE GUILLOU, CEO,
RES Deutschland GmbH



“In Norway, Sweden and Finland. Because they are Ramboll’s home markets, where we can combine deep local knowledge with strong engineering teams to deliver outstanding expertise to our customers.”

JOACHIM BINOTSCH, Business Development Manager
Onshore Wind, Ramboll



“With local production facilities in China, India and the USA, Rittal serves the Asian and American focus markets of wind energy.”

FRANZISKA HAIN, Vertical Market Manager Energy,
Rittal GmbH & Co. KG