



The premier forecasters of the wind industry
November 2008

Dear Wind Energy Professional,

For more than a decade, wind industry leaders from around the world have agreed on one thing:

BTM CONSULT ApS
is the premier forecaster of the international wind industry.

No other source will give you more in-depth and accurate information about the world's fastest growing power industry.

With today's overload of information, and with reports covering the Chinese market being introduced almost every week, it is important that global wind decision-makers get the most valuable, precise and effective information about the Chinese market from the wind industry's premier source.

Therefore, we are proud to introduce you to the latest report from BTM Consult ApS:

Made in China

BTM Consult presents the latest in-depth market study of the complex, and at the same time very promising, Chinese wind energy market. BTM's research for this market analysis has been ongoing for more than a year, with the latest key information garnered from our attendance at GLOBAL WIND POWER 2008 in Beijing, October 29-31, 2008.

In the midst of the current financial crisis, the Chinese market is still forging ahead with investments in wind energy in order to make the Chinese energy mix cleaner and to be a global leader in the fight against climate change.

Made in China focuses on:

- the details of policies, regulations and incentives relevant to wind power
- the market and the players, both local and foreign, in the demand side,
- the manufacturers of wind turbine generators, including domestic, joint venture and foreign players
- the breakthroughs in the supply chain bottlenecks by 120 domestic key components and materials suppliers
- the ongoing relationship between the key components suppliers and 40 domestic wind turbine OEMs
- the performance of the operating capacity in 12 provinces
- the key investment conditions for local and foreign project developers.
- the current market status and forecast ahead at a target of 80-100 GW of installed capacity by 2020

In light of political will and positive public attitude towards the use of wind energy, the Chinese market is booming and will transform the whole wind energy picture in terms of new turbine manufacturers and component suppliers.

All in all, the new BTM Report will lead you to a better understanding of this very interesting and progressive market.



North American Representative for WORLD MARKET UPDATE

Published by:



Pricing:

Hardcopy incl. CD-R with selected tables, graphics	US\$ 1,100.00 incl. postage. (Courier service at extra charge)
Corporate license for the CD-R incl. a hardcopy	US\$ 4,400.00 – For company INTRANET use only.
Quantity discount:	2-5 copies: 10% on all copies. >5 copies – up: 20% on all copies
<i>All prices are subject to change without further notice.</i>	

Ordering:

- www.sindal-lundsberg.com/reports,
- Fax the attached order form to 909-494-4254
- E-mail the order to ann.howe@sindal-lundsberg.com
-

Delivery will take place immediately upon the report's release, which is scheduled for December 10.

Best regards,
Anne-Marie Howe, ADM

-
1. **Yes – Please book my order for the Hard Copy and CD/R** **No. Of copies** _____
 2. **Yes – Please book my order for Corporate License for CD-R**
Incl. a hard copy of the report **No. Of copies** _____

Please complete your SHIPPING AND BILLING address:

Attention _____

Company _____

Address 1 _____

Address 2 _____

City _____ **Postal Code** _____

Country: _____

Phone / Fax _____

Email _____

International Wind Energy Development

MADE IN CHINA **Chinese Wind Power Market Assessment** **2008-2012**

Content

Table

Figure

Preface

Executive summary

1. Market Overview

1.1 Introduction

1.2 General energy situation in China

1.3 Current Chinese utility system

1.4 Wind resources

1.5 Wind power capacity in China as of 2007

2. Policy Framework

2.1 Policy, regulation and incentives for wind power

2.1.1 Implementation of renewable energy law

2.1.2 Taxation

2.1.3 Import custom duty and VAT

2.1.4 Clean Development Mechanism

2.1.5 Subsidy for local wind power equipment

2.2 Government agency and association

2.3 Historical development of the Chinese market

2.4 Current investment environment for wind power



SINDAL

North American Representative for *WORLD MARKET UPDATE*

Published by:



The premier forecasters of the wind industry

3. Wind Turbine Suppliers

- 3.1 Wind turbine suppliers in China
- 3.2 Local Chinese-owned WTGs suppliers
 - 3.2.1 Overview of local Chinese WTGs suppliers
 - 3.2.2 Technology source for local wind turbines
 - 3.2.3 Trends in local turbine manufacturing type
 - 3.2.4 Trends in local turbine manufacturing capacity
 - 3.2.5 Current local turbine price and future trends
 - 3.2.6 Profiles of large Chinese WTGs suppliers
- 3.3 Joint ventures of WTGs suppliers in China
 - 3.3.1 Overview of joint ventures of WTGs suppliers
 - 3.3.2 Profiles of joint ventures of WTGs suppliers
- 3.4 Foreign owned turbine suppliers in China
 - 3.4.1 Overview of foreign-owned turbine suppliers
 - 3.4.2 Profiles of foreign-owned turbine suppliers

4. The Chinese Supply Chain

- 4.1 Overview of the supply chain in China
 - 4.1.1 Current situation of domestic supply chain
 - 4.1.2 Target for domestic supply chain
- 4.2 Key component suppliers in China
 - 4.2.1 Blades
 - 4.2.2 Gearboxes
 - 4.2.3 Electric generators
 - 4.2.4 Bearings
 - 4.2.5 Power converters
 - 4.2.6 Power transformers
- 4.3 Key materials suppliers in China
 - 4.3.1 Castings
 - 4.3.2 Forgings
- 4.4 Supply chain analysis of 40 domestic WTGs manufacturers
- 4.5 Influence of Chinese supply chain on international supply chain



SINDAL

North American Representative for *WORLD MARKET UPDATE*

Published by:



The premier forecasters of the wind industry

5. Wind Project Developments and Ownership

- 5.1 Types of wind power projects in China
 - 5.1.1 Concession projects
 - 5.1.2 The negative impacts of concession projects
- 5.2 Performance of operational wind projects in China
 - 5.2.1 Analyses of operational wind project performance
- 5.3 Wind power development value chain
 - 5.3.1 Design of wind projects in China
 - 5.3.2 Construction of wind projects in China
 - 5.3.3 O&M of Chinese wind projects
 - 5.3.4 Grid connection
 - 5.3.5 Feed-in tariff in 14 provinces and regions
- 5.4 Wind project ownership structure in China
- 5.5 Current conditions for wind power development
 - 5.5.1 General conditions for wind power under the cloud of financial crisis
 - 5.5.2 Key investment conditions for domestic wind power developers
 - 5.5.3 Key investment conditions for foreign wind power developers
- 5.6 Profiles of wind power project developers in China
 - 5.6.1 State-owned Conventional Power Generation Corporation
 - 5.6.2 State-owned Energy Group
 - 5.6.3 Other large Chinese wind power developers
 - 5.6.4 IPPs/institutional investors/joint ventures

6. Forecast for wind power development in China

- 6.1 Drivers for wind power development in China
- 6.2 Challenges of Chinese wind power market
- 6.3 Perspectives until 2012

Appendix

Index

(MADE IN CHINA, SINDAL INTRO SALES LET VER. 1 NOV 2008)