



Canada Wind Power Markets and Strategies, 2007–2015

March 2007

Study Highlights:

Extensive Province by Province Analysis

IPP and Developer Competitive Analysis

- Wind power project pipelines and developer activity
- Market share analysis and value chain positioning
- Strategic wind IPP and developer profiles

Profiles of Canada's Utilities

- Utility portfolio and carbon emissions mitigation strategies
- Wind energy procurement activities and large-scale utility wind RFP activity

Wind Turbine Manufacturer and Component Supplier Analysis

- Wind turbine infrastructure market trends and structure
- Local vs. foreign turbine supply analysis
- Installations by vendor and product size
- Supply chain analysis

Indepth Canadian Market Environment Analysis:

- RFP activity, Wind Power Production Incentives: ecoEnergy, Renewable Power Program, feed-in tariffs, wind energy quotas

Canadian Provincial Wind Market Rankings

- Wind IPPs and Wind Farm Owners
- Wind Power Market Environments

Market Forecasts through 2015

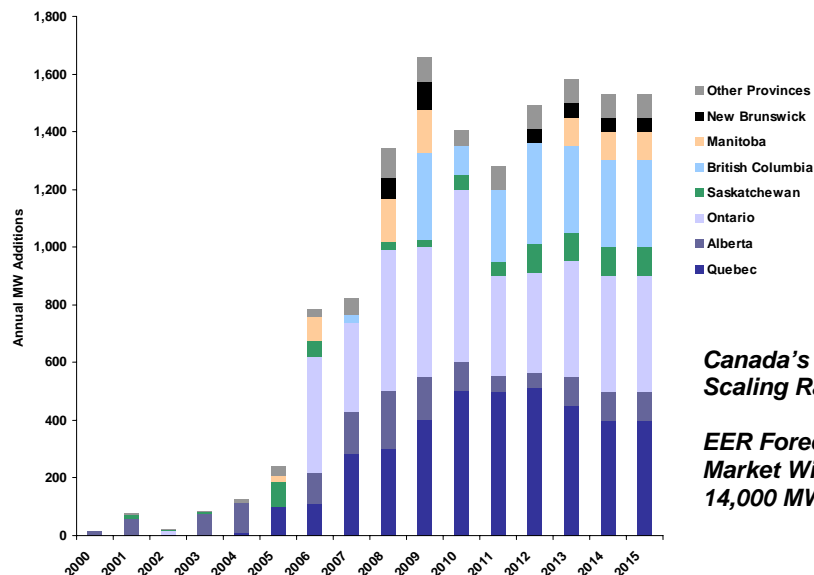
- Wind power capacity market forecasts by province (base case, low growth, and high growth scenarios)
- Trends and forecasts in wind farm size
- Offshore market potential

After more than doubling in size in 2006, the Canadian wind market will see unprecedented growth over the next decade adding 1,400 MW annually through 2015. Moving up from the seventh largest wind power market in 2006, Canada is in position to break the top five global wind power markets in 2009, according to EER forecasts.

Canada Wind Power Markets and Strategies, 2007–2015 is the most indepth market study available on this fast growing market. EER's new study provides comprehensive analysis of Canada's national and provincial wind power market environments and the strategies of key players competing in this growing market.

- **Development competition is heating up among major players:** Competitive positioning is tightening as aggressive emerging wind IPPs and major Canadian energy players are actively consolidating the market through acquisitions and partnerships, leaving far less breathing room for smaller, independent developers.
- **GE and new entrants challenge Vestas for turbine market leadership:** GE, Siemens, Enercon, and AAER are competing in the Canadian turbine market, which was once-dominated by Vestas/NEG Micon. Turbine availability from key vendors is being negotiated within the context of the larger North American wind market, with most vendors anchoring their manufacturing facilities in the US and relying heavily on transportation strategies to supply Canada with turbines.
- **Led by Ontario and Québec, provincial RFPs drive growth in Canadian wind market:** Canada's wind project development market is currently undergoing a dynamic shift as the country's fledgling wind industry scales and utility RFP demand drives frenzied development activity and strategic positioning. Ontario and Québec are expected to account for 60 percent of the country's total market by 2015.

Exhibit: Annual Wind Power Capacity Additions by Province 2000-2015 (MW)



Canada's Wind Market Scaling Rapidly

EER Forecasts Canadian Market Will Surpass 14,000 MW by 2015

Source: Emerging Energy Research



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