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US Wind Power Markets and Strategies, 2008-2020

July 2008

Study Highlights:

Extensive State by State Analysis

Competitive Analysis of IPPs and Developers
- Strategic wind IPP and developer profiles
- Wind power project pipelines and developer activity
- Market share analysis and value chain positioning

Strategy Profiles of US Utilities
- Utility portfolios and carbon emissions mitigation strategies
- Wind energy procurement 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

In-depth Analysis of US Market Environment:
- PTC scenarios
- Regulatory market drivers and inhibitors
- Transmission constraints

US Wind Market Rankings
- Wind IPPs and wind farm owners
- Wind power market environments

Market Forecasts through 2020
- Wind power capacity market forecasts by state
- Trends and forecasts in wind farm size
- Offshore market potential

The US wind power market is exploding – accounting for 27% of global wind MW additions in 2007 and resulting in over 8.6 GW under construction in 2008. Cumulative installations grew 45% in 2007 to nearly 17 GW, a number that is expected to reach at least 100 GW by 2020. And with the PTC likely to be extended beyond 2008, the US market will continue to take center stage in the burgeoning wind power industry for years to come.

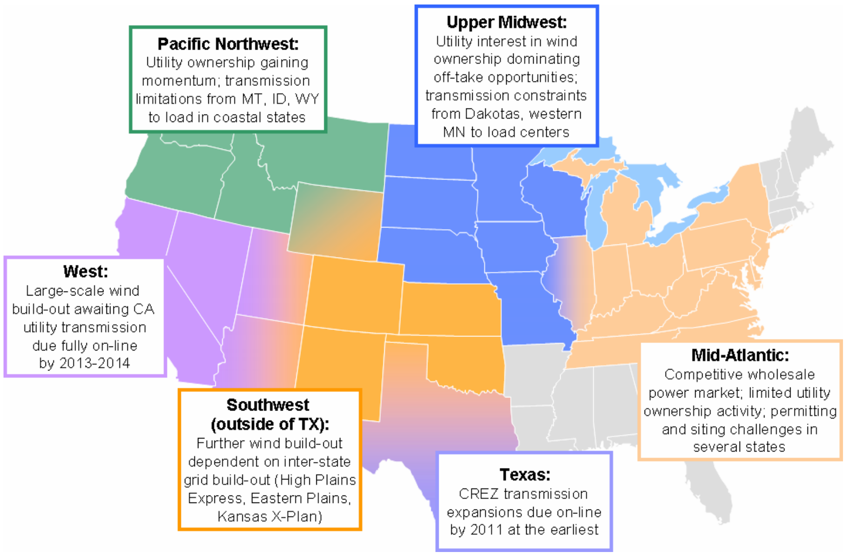
EER's new study, ***US Wind Power Markets and Strategies, 2008–2020***, provides critical strategic and tactical support for those seeking to compete in these markets -- developers, IPPs, utilities, turbine manufacturers, component and infrastructure suppliers, EPC providers, financial institutions and investors. Among the key findings in the study:

- **Substantial build-out in US wind turbine supply chain underway:** Leading US wind IPPs and utilities continue to seek large-scale framework turbine supply contracts, leading to significant flux in developer-OEM relationships. While substantial investments in new supply capacity are underway, framework contracts typically must be signed 2-3 years in advance of project delivery. 2010 may be the earliest year in which substantial cost competition returns to the US wind turbine market.

- **Utilities adopting higher-risk wind procurement strategies:** US utilities are moving steadily into wind asset ownership and project development, taking on additional risks across the wind value chain. This growing trend in the Midwest and Pacific Northwest is placing greater pressure on IPPs with PTC tax appetite to find creative solutions for power off-take.

- **Transmission issues continue to challenge US wind growth in both near and long term:** As US wind development booms, transmission expansion has fallen behind leaving IPPs to take proactive approaches to unlock new wind resource areas. Over the longer term, wind grid penetration will play a crucial role in determining the potential ceiling on new wind development in key utility service territories and regions.

Exhibit: Near-term Challenges to Wind IPP Growth by US Region



Source: Emerging Energy Research

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