

GLOBAL WIND ENERGY POTENTIAL

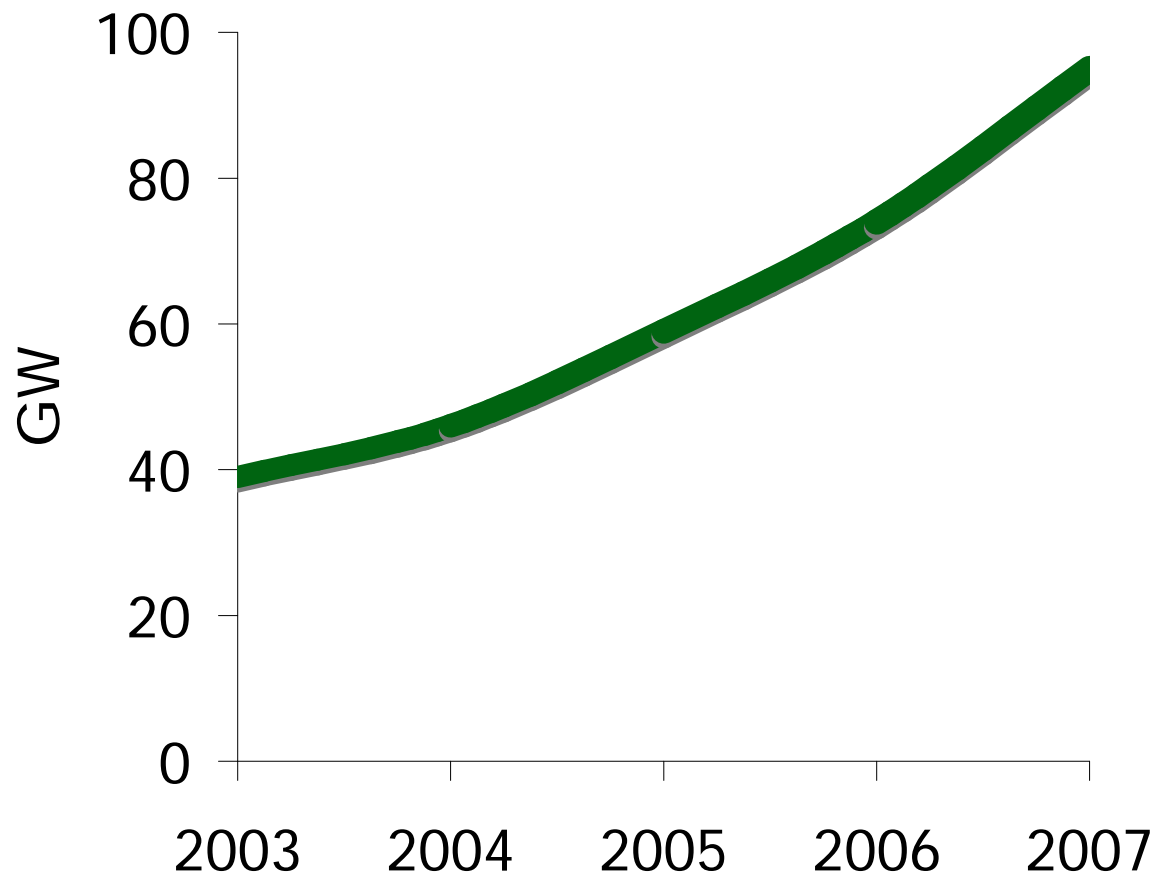
Colin Palmer



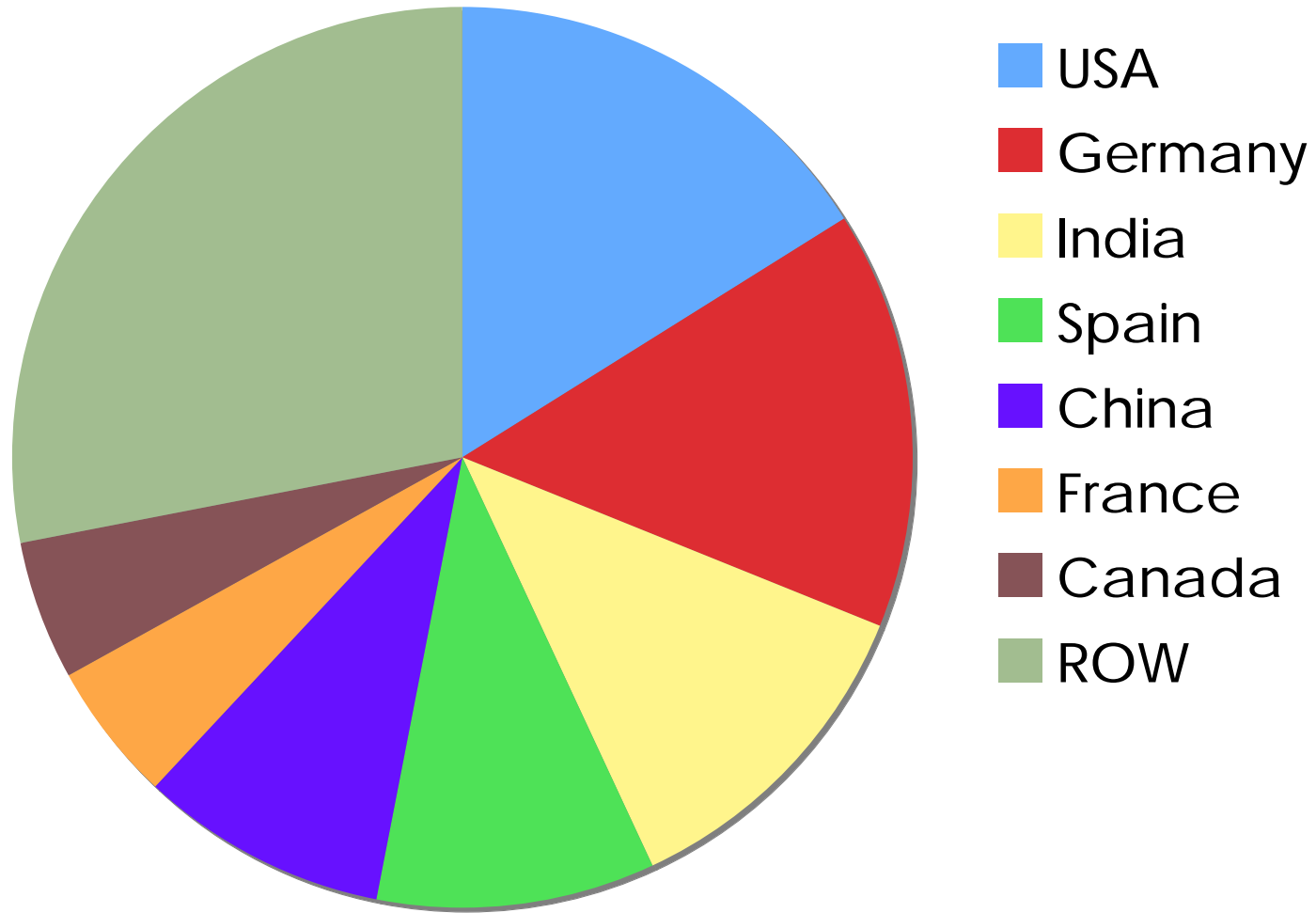
THE MARKET



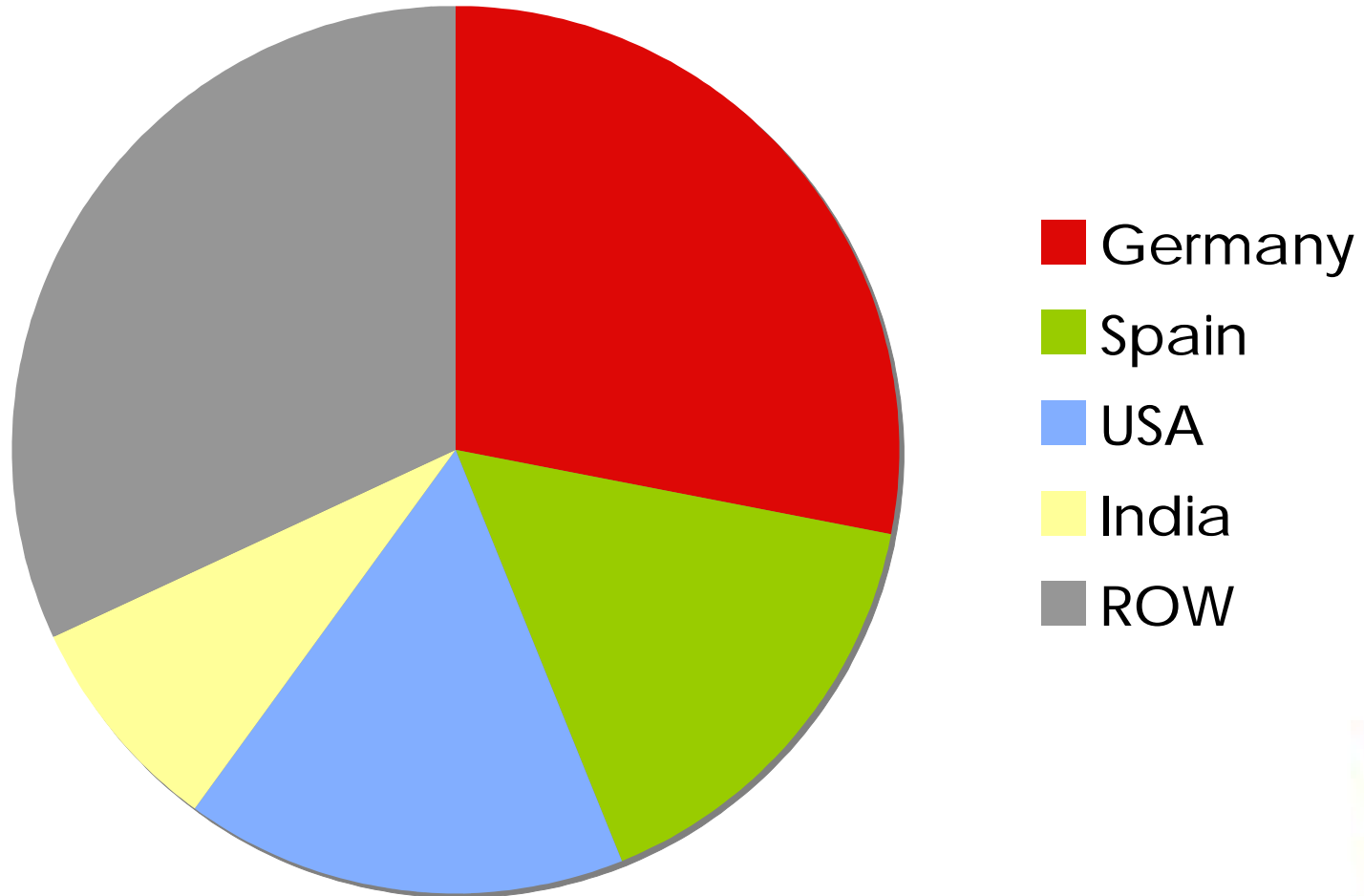
Global Wind Energy Capacity



2006 Capacity by Country



Total Capacity by Country



SUMMARY

- ◆ **20GW/yr by 2008**
- ◆ **>100GW total by 2008**
- ◆ **Increasing diversity**
- ◆ **Less reliance on Europe**



And in the UK?

- ◆ **2 GW total**
- ◆ **< 3% global capacity**
- ◆ **Offshore to the rescue?**
- ◆ **10GW pipeline**
 - **304MW built**



THE INDUSTRY



VESTAS

- ◆ **£3.0 bn/yr sales**
- ◆ **12,000 employees**
- ◆ **30% market share**
- ◆ **20GW to date**



OTHERS

- ◆ Enercon
- ◆ Gamesa
- ◆ RePower
- ◆ Suzlon

SIEMENS



GE
Energy

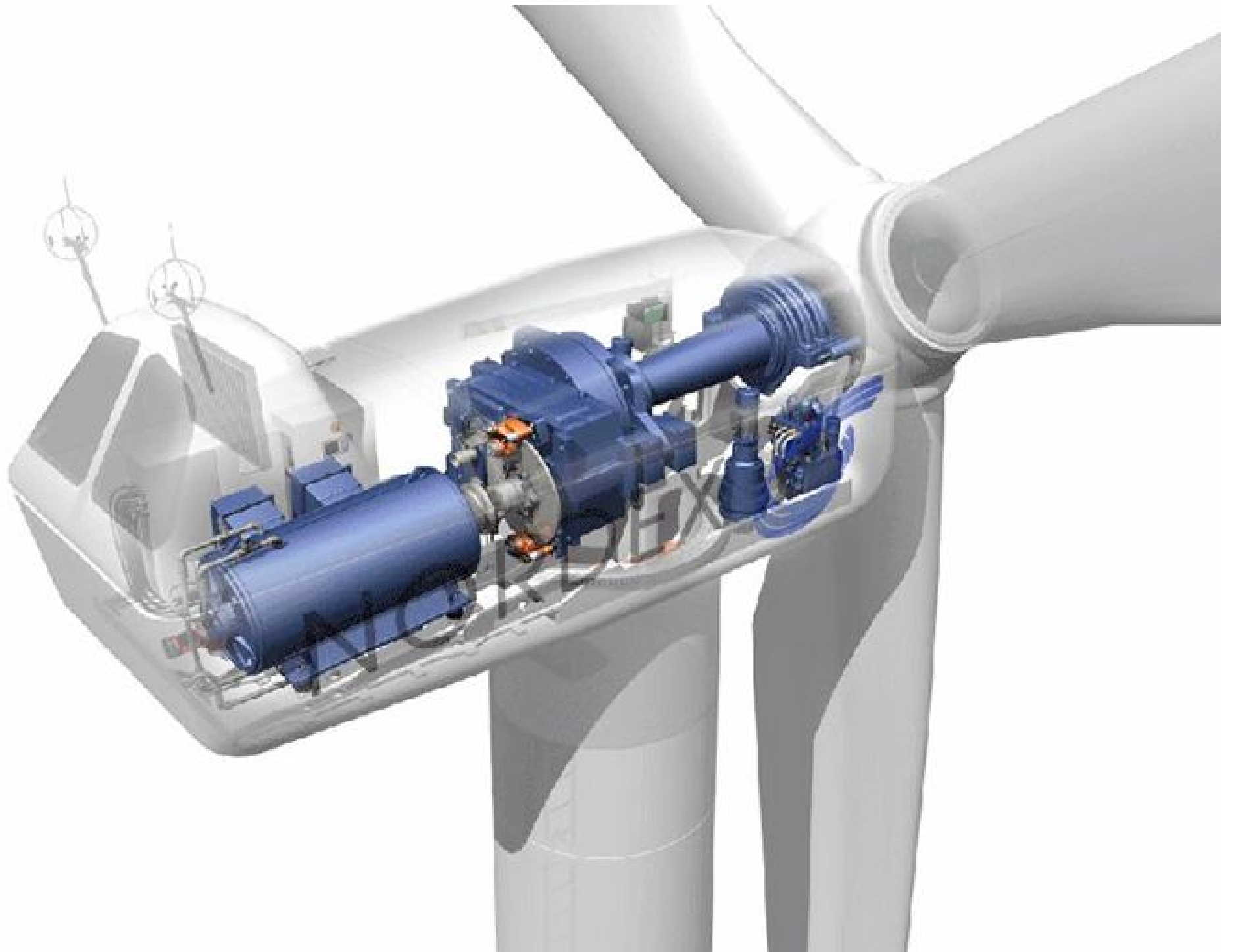
Consolidation



TURBINE DESIGN

- ◆ 3 blade upwind
- ◆ 1.5MW to 5MW
- ◆ Onshore and offshore
- ◆ Reliable and proven
- ◆ Incremental advance









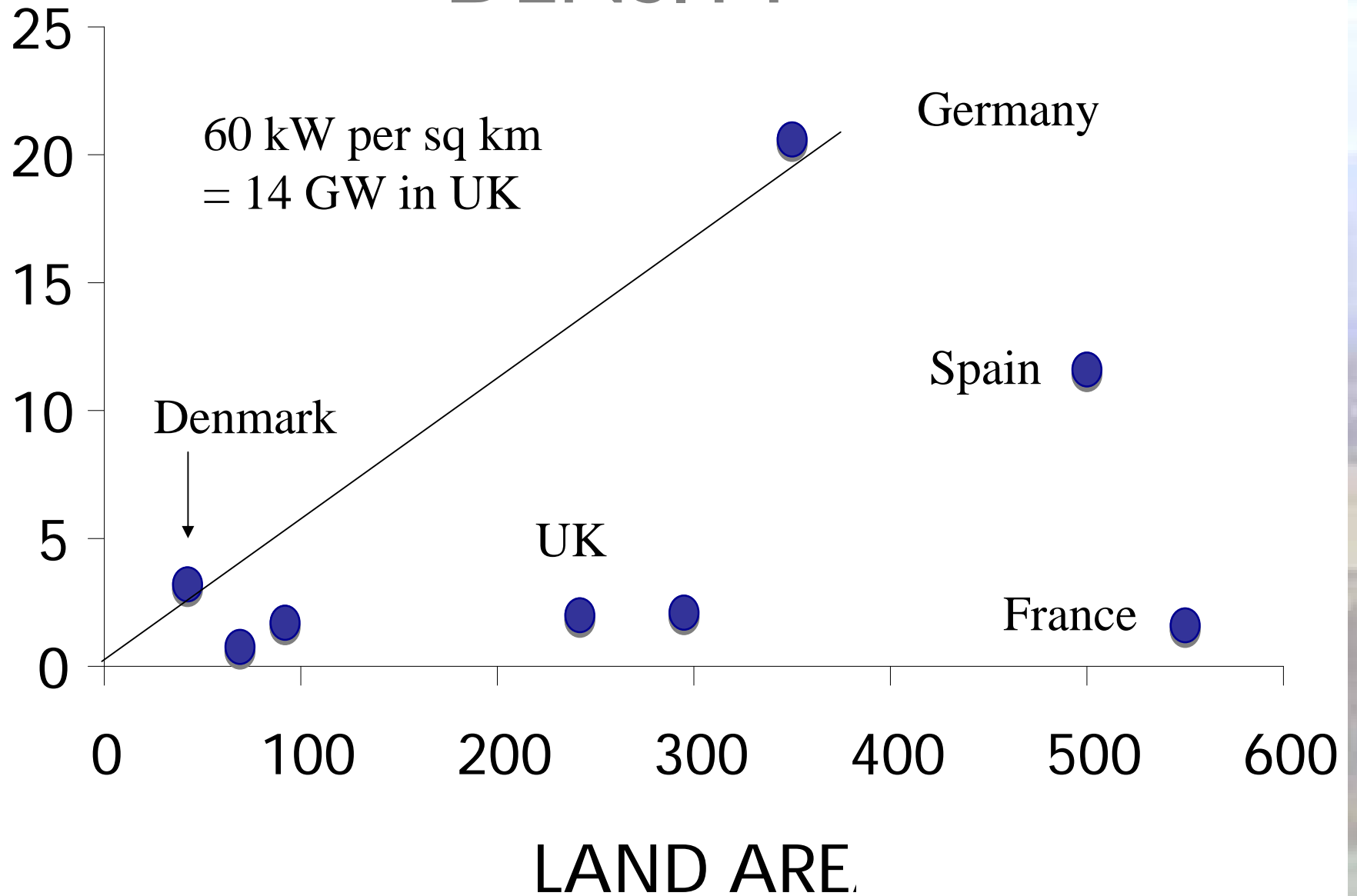
ISSUES

- ◆ **Supply shortages**
- ◆ **Connection**
- ◆ **Permitting**
- ◆ **(Intermittency)**

It's the policies, stupid



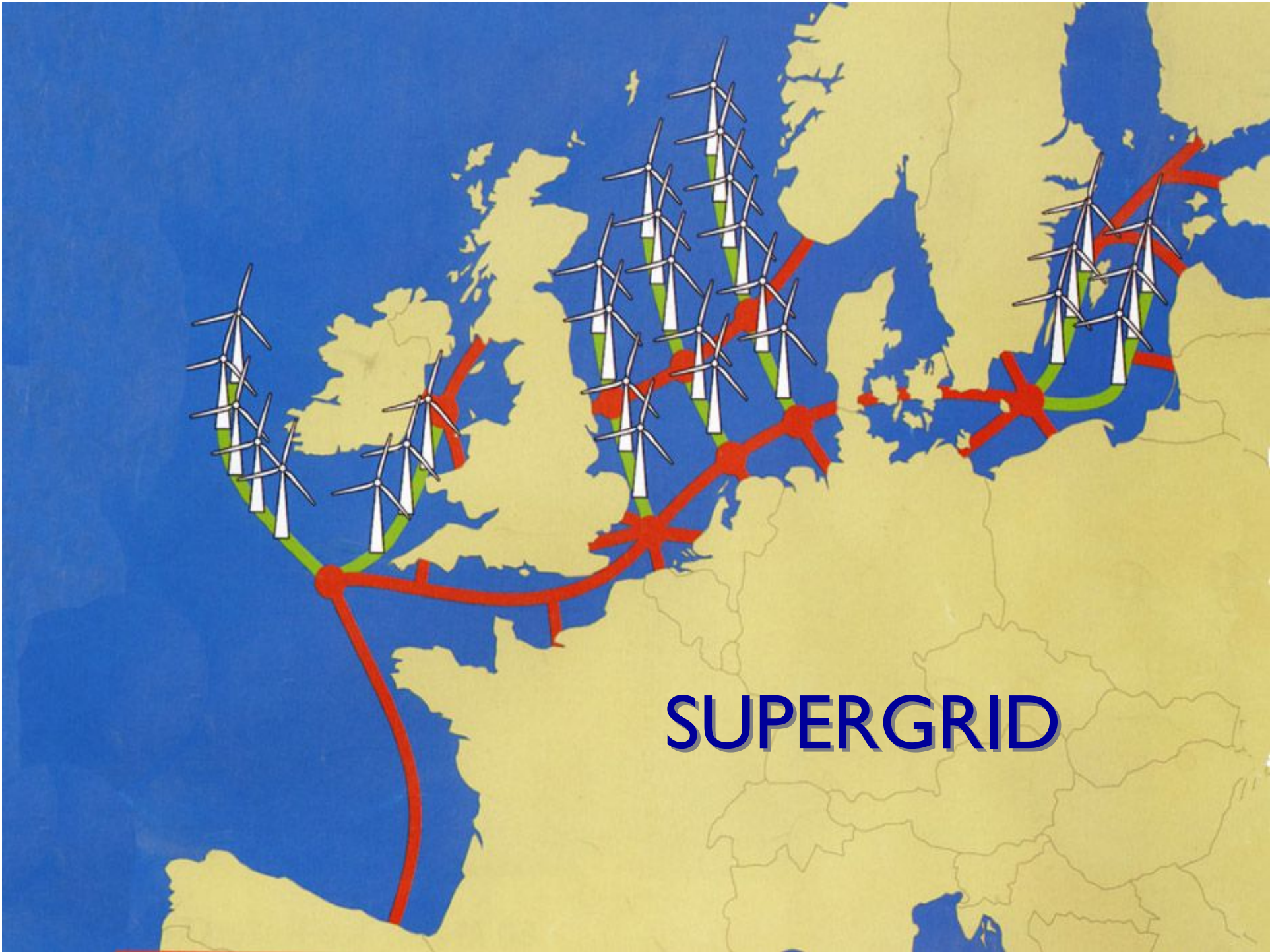
DENSITY



DEALS BEING DONE

- ◆ **Gamesa/Iberdrola**
 - £1.5 bn supply over two years
- ◆ **Texas loop**
 - 4,200 MW connection
 - \$1.5 bn





SUPERGRID