Wind Turbine Rotor Blade Market by Material, by Blade Size and Geography - Global Trends and Forecasts to 2019

Description: Wind Turbine Rotor Blade Market by Material (Glass Fiber, Carbon Fiber), by Blade Size (<27 Meter, 27-37 Meter, 38-50 Meter, and >50 Meter) and Geography - Global Trends and Forecasts to 2019

The report provides detailed analysis of the wind turbine rotor blade market, which is growing in sync with the growing demand for turbines used to produce wind energy. The market has been geographically segmented into the regions of Asia-Pacific, North America, Europe, the Middle East and Africa, and South America. The market was segmented further as per the type of materials used in the manufacturing of turbine rotor blades, for example carbon fiber. The report provides volume and value information for rotor blades segmented according to their length as well.

The global wind energy market has been growing steadily owing to rising energy demand, raising concerns over environmental impact of power generation through fossil fuel. The wind energy market saw a declining trend in the U.S. and Europe in 2013 due to the Production Tax Credit (PTC) policy expired in U.S. and low investments in Europe respectively. China leads the wind energy market mainly because of the government impetus on wind power generation. Other Asia-Pacific countries like India, Turkey, and Australia are also showing positive growth trends in wind power generation backed by government initiatives. The Middle East and Africa remain at a very nascent stage of the wind energy market and have the lowest market share among the regions.

The report further provides qualitative analysis of the leading players, with a clear insight and analysis on the development strategies preferred by the market players. The report also includes a chronology of the developments with respect to contracts, agreements, and expansions. The market dynamics in terms of market drivers, restraint, and opportunities are discussed in detail in the report. The key players such as Siemens AG (Germany), Vestas Wind System AS (Denmark), Suzlon Energy Limited (India), Acciona S.A. (Spain), and Gamesa Corporacion Tecnologica (Spain) have been profiled in this report. The market players undertake contracts, agreements, joint ventures and partnerships, and expansion as part of their development strategy.

The wind turbine rotor blade market size is projected to grow at a CAGR of 9.2% from 2014 to 2019. The market was dominated by Asia-Pacific in 2013. Strong growth has been projected for the turbine rotor blade market in the next five years, as demand for wind turbines continues to rise in the wake of growing use of renewable energy.

SCOPE OF THE REPORT
This report focuses on the wind turbine rotor blade market. The market was segmented on the basis of material types, blade lengths, and regions.

On the basis of material type
- Carbon Fiber
- Glass Fiber

On the basis of blade lengths
- <27 meter
- 27-37 meter
- 38-50 meter
- >50 meter

On the basis of region
- Asia-Pacific
- North America
- Europe
- Middle East and Africa
- South America
Contents:

1 Introduction
   1.1 Objectives
   1.2 Market Definition
   1.3 Market Scope
      1.3.1 Markets Covered
      1.3.2 Years
   1.4 Currency & Pricing
   1.5 Package Size
   1.6 Limitations
   1.7 Stakeholders

2 Research Methodology
   2.1 Research Data
   2.2 Secondary Data
      2.2.1 Key Data From Secondary Sources
   2.3 Primary Data
      2.3.1 Key Data From Primary Sources
      2.3.2 Key Industry Insights
      2.3.3 Breakdown of Primary Interviews
   2.4 Market Size Estimation
   2.5 Market Breakdown and Data Triangulation
   2.6 Research Assumptions
      2.6.1 Assumptions of the Research Study

3 Executive Summary

4 Premium Insights
   4.1 Attractive Opportunities in offshore Wind Power Generation
   4.2 Wind Turbine Rotor Blade Market, By Blade Length
   4.3 Wind Turbine Rotor Blade Market in Asia-Pacific
   4.4 Asia-Pacific to Account for More Than Half of the Market Share
   4.5 Wind Turbine Rotor Blade Market: Developed vs. Developing Nations
   4.6 Wind Turbine Rotor Blade Market, By Blade Length (2014-2019)
   4.7 Wind Turbine Rotor Blade Market, By Blade Length
   4.8 Life Cycle Analysis, By Region

5 Market Overview
   5.1 Global Wind Energy Scenario
   5.2 Market Evolution
   5.3 Market Segmentation
      5.3.1 By Materials
      5.3.2 By Blade Length
      5.3.3 By Region
   5.4 Market Dynamics
      5.4.1 Drivers
         5.4.1.1 Favorable Environmental Policy
         5.4.1.2 Declining Costs of Wind Energy Generation
      5.4.2 Restraints
         5.4.2.1 High Capital Investment
         5.4.2.2 Use of Expensive Material
      5.4.3 Opportunities
         5.4.3.1 Future Growth in Wind Energy Sector
         5.4.3.2 Repowering Old Projects
         5.4.3.3 Increasing Size of Rotor Blades
      5.4.4 Challenges
         5.4.4.1 Localized Regulatory Hurdles
         5.4.4.2 Opposition From Local Communities and Energy Lobbies
         5.4.4.3 Transportation of Rotor Blades
         5.4.4.4 Variability in Wind Speeds

6 Industry Trends
   6.1 Value Chain Analysis
   6.2 Porter's Five Forces Analysis
6.2.1 Threat of New Entrants
6.2.2 Threat of Substitutes
6.2.3 Bargaining Power of Suppliers
6.2.4 Bargaining Power of Buyers
6.2.5 Intensity of Rivalry

7 Wind Turbine Blade Market, By Material
7.1 Introduction
7.2 Market Analysis, By Blade Material, 2012–2019 ($Million)
7.3 Market Analysis, By Material, 2012–2019 (Metric Tonnes)
7.4 Glass Fiber
7.4.1 By Region
7.5 Carbon Fiber
7.5.1 By Region
7.6 Regional Overview
7.6.1 Middle East & Africa
7.6.2 Asia-Pacific
7.6.3 Europe
7.6.4 North America
7.6.5 South America

8 Wind Turbine Blade Market, By Blade Length
8.1 Introduction
8.2 Market Analysis, By Blade Length
8.2.1 Less Than 27 Meter
8.2.2 Between 27-37 Meter
8.2.3 Between 38-50 Meter
8.2.4 Greater Than 50 Meters
8.3 Region-Wise Wind Turbine Blade Market, By Blade Length
8.3.1 Middle East and Africa
8.3.2 Asia-Pacific
8.3.3 European
8.3.4 North America
8.3.5 South America

9 Wind Turbine Rotor Blade Market, By Geography
9.1 Introduction
9.2 Market Analysis, By Region
9.3 Cumulative Wind Energy Market, By Region
9.4 Regional Overview, By Number of Blades
9.5 Middle East & Africa
9.5.1 Overview
9.5.2 Annual Wind Energy Market
9.5.3 Cumulative Wind Energy Market
9.5.4 By Country
9.5.4.1 South Africa
9.5.4.2 Others
9.6 Asia-Pacific
9.6.1 Overview
9.6.2 Annual Wind Energy Market
9.6.3 Cumulative Wind Energy Market
9.6.4 By Country
9.6.4.1 China
9.6.4.2 India
9.6.4.3 Australia
9.6.4.4 Others
9.7 Europe
9.7.1 Overview
9.7.2 Annual Wind Energy Market
9.7.3 Cumulative Wind Energy Market
9.7.4 By Country
9.7.4.1 Germany
9.7.4.2 Spain
9.7.4.3 U.K.
9.7.4.4 Others
9.8 North America
9.8.1 Overview
9.8.2 Annual Wind Energy Market
9.8.3 Cumulative Wind Energy Market
9.8.4 By Country
9.8.4.1 U.S.
9.8.4.2 Others
9.9 South America
9.9.1 Overview
9.9.2 Annual Wind Energy Market
9.9.3 Cumulative Wind Energy Market
9.9.4 By Country
9.9.4.1 Brazil
9.9.4.2 Others

10 Competitive Landscape
10.1 Overview
10.2 Competitive Situation and Trends
10.2.1 Contracts & Agreements
10.2.2 New Product/Service Development
10.2.3 Expansions
10.2.4 Mergers & Acquisitions
10.2.5 Other Developments

11 Company Profiles
(Company at A Glance, Recent Financials, Products & Services, Strategies & Insights, & Recent Developments)*
11.1 Introduction
11.2 China National Materials Company Limited (Sinoma)
11.3 Gamesa S.A.
11.4 General Electric Company
11.5 Siemens AG
11.6 Sinoi GMBH
11.7 Suzlon Energy Limited
11.8 Vestas Wind Systems A/S
11.9 Acciona, S.A
11.10 Enercon GMBH
11.11 Nordex S.E.
11.12 Powerblades GMBH
11.13 SGL Rotec GMBH & Co. KG (Carbon Rotec)

*Details on Company at A Glance, Recent Financials, Products & Services, Strategies & Insights, & Recent Developments Might Not Be Captured in Case of Unlisted Companies.

12 Appendix
12.1 Insights of Industry Experts
12.2 Discussion Guide
12.3 Introducing RT: Real Time Market Intelligence
12.4 Available Customizations
12.5 Related Reports

List of Tables (74 Tables)
Table 1 Net Electricity Generation, By Region, 2009–2013 (Terrawatt-Hours)
Table 2 Wind Energy Cumulative Installed Capacity, By Country, 2009–2013 (MW)
Table 3 Cost Benefits and Favorable Policy Structures Are Propelling the Growth of Wind Turbine Rotor Blade Market
Table 4 High Initial Investment of Wind Turbines Restrain Market Growth
<table>
<thead>
<tr>
<th>Table</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Average Annual Investment in Wind Energy Sector, ($Billion)</td>
</tr>
<tr>
<td>6</td>
<td>Future Growth Projections for Wind Energy Generation and Repowering of Existing Projects Present Opportunities for Wind Turbine Rotor Blade Market</td>
</tr>
<tr>
<td>7</td>
<td>Localized Regulatory Hurdles and Opposition to Wind Farms in Some Local Communities is A Challenge for Wind Energy Industry</td>
</tr>
<tr>
<td>8</td>
<td>Characteristics of Carbon Fiber</td>
</tr>
<tr>
<td>9</td>
<td>Characteristics of Glass Fiber</td>
</tr>
<tr>
<td>10</td>
<td>Wind Turbine Blade Market Size, By Material, 2012–2019 ($Million)</td>
</tr>
<tr>
<td>12</td>
<td>Glass Fiber Material Market Size, By Region, 2012–2019 ($Million)</td>
</tr>
<tr>
<td>13</td>
<td>Glass Fiber Material Market Size, By Region, 2012–2019 (Metric Tones)</td>
</tr>
<tr>
<td>14</td>
<td>Carbon Fiber Material Market Size, By Region, 2012–2019 ($Million)</td>
</tr>
<tr>
<td>15</td>
<td>Carbon Fiber Material Market Size, By Region, 2012–2019 (Metric Tones)</td>
</tr>
<tr>
<td>24</td>
<td>South America: Wind Turbine Market Size, By Material, 2012–2019 ($Million)</td>
</tr>
<tr>
<td>26</td>
<td>Wind Turbine Blade Market Size, By Blade Length, 2012–2019 ($Million)</td>
</tr>
<tr>
<td>27</td>
<td>Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>28</td>
<td>&lt;27 Meter - Wind Turbine Blade Length Market Size, By Region, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>29</td>
<td>27-37 Meter - Wind Turbine Blade Length Market Size, By Region, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>30</td>
<td>38-50 Meter - Wind Turbine Blade Length Market Size, By Region, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>31</td>
<td>&gt;50- Wind Turbine Blade Length Market Size, By Region, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>32</td>
<td>Middle East &amp; African Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>33</td>
<td>Asia-Pacific Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>34</td>
<td>European Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>35</td>
<td>North American Wind Turbine Blade Market, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>36</td>
<td>South American Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>37</td>
<td>Wind Turbine Blade Market Size, By Region, 2012–2019 ($Million)</td>
</tr>
<tr>
<td>39</td>
<td>Cumulative Wind Energy Market Size, By Region 2012–2019 (MW)</td>
</tr>
<tr>
<td>40</td>
<td>Wind Turbine Blade Market Size, By Region, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>42</td>
<td>Middle East and Africa: Cumulative Wind Energy Market Size, By Country 2012–2019 (MW)</td>
</tr>
<tr>
<td>43</td>
<td>Middle East and Africa: Wind Turbine Blade Market Size, By Country, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>44</td>
<td>South Africa: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>45</td>
<td>Others: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>50</td>
<td>India: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>51</td>
<td>Australia: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>52</td>
<td>Others: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>54</td>
<td>Europe: Cumulative Wind Energy Market Size, By Country, 2012-2019 (MW)</td>
</tr>
<tr>
<td>55</td>
<td>Europe: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>56</td>
<td>Germany: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>57</td>
<td>Spain: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
<tr>
<td>64</td>
<td>Others: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)</td>
</tr>
</tbody>
</table>
Table 65 South America: Annual Wind Energy Market Size, By Country, 2012-2019 (MW)
Table 66 South America: Cumulative Wind Energy Market Size, By Country, 2012-2019 (MW)
Table 67 South America: Wind Turbine Blade Market Size, By Country, 2012–2019 (Number of Blades)
Table 68 Brazil: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)
Table 69 Others: Wind Turbine Blade Market Size, By Blade Length, 2012–2019 (Number of Blades)
Table 70 Contracts & Agreements, 2012-2014
Table 71 New Product/Service Development, 2012-2014
Table 72 Expansions, 2012-2014
Table 73 Mergers & Acquisitions, 2012-2014
Table 74 Other Developments, 2012-2014

List of Figures (66 Figures)

Figure 1 Wind Turbine Rotor Blade Markets Covered
Figure 2 Wind Turbine Rotor Blade Market: Research Design
Figure 3 Breakdown of Primary Sources: By Company Type, Designation, and Region
Figure 4 Market Size Estimation Methodology: Bottom-Up Approach
Figure 5 Market Size Estimation Methodology: Top-Down Approach
Figure 6 Data Triangulation Methodology
Figure 7 Market for 27-37 Meter Blades to Grow at Fastest Pace During 2014-2019
Figure 8 The 38-50 Meter Blade Market is the Most Attractive Investment Option for the Next Five Years
Figure 9 Asia-Pacific is the Leading Wind Turbine Rotor Blade Market, 2013
Figure 10 Trend of Increasing Blade Lengths to Continue Till 2019
Figure 11 Use of Carbon Fiber in Blade Manufacture to Increase at A Higher Rate Between, 2014-2019
Figure 12 Contracts and Agreements: Top Drivers of Growth for Wind Turbine Rotor Blade Companies, 2011-2014
Figure 13 China and Germany Most Lucrative Among Top Country Markets, 2014-2019
Figure 14 Offshore Wind Power Generation Offer Lucrative Opportunity
Figure 15 The Demand for Blade Length Between 38-50 Meters Will Be Highest
Figure 16 China Expected to Capture the Lion’s Share in the Asia-Pacific Market
Figure 17 Asia-Pacific to Remain the Largest and Fastest Growing Market, Due to Decline in the U.S., and Europe Market
Figure 18 Developing Economies Are Growing Fast
Figure 19 Major Share of the Total Market Growth Would Come From Rotor Blade With Average Length Between 38-50 Meters, Between 2014–2019
Figure 20 China to Have the Largest Share in Emerging Economies of the Asia-Pacific Region
Figure 21 Market in India and China Soon to Enter Exponential Growth Phase During the forecast Period
Figure 22 Annual New Wind Energy Installed Capacity, By Top 10 Countries, 2012–2013 (MW)
Figure 23 Market Evolution: Wind Turbine Rotor Blades Have Been Larger in Size During the Last Two Decades
Figure 24 Market Segmentation of Wind Turbine Rotor Blade Market
Figure 25 Wind Turbine Rotor Blade Market, By Materials
Figure 26 Wind Turbine Rotor Blade Market, By Blade Length
Figure 27 Wind Turbine Rotor Blade Market, By Region
Figure 28 Market Dynamics of Wind Turbine Rotor Blade
Figure 29 Projections for Repowering Demand, Annual and Cumulative (MW)
Figure 30 Value Chain Analysis: Major Value is Added During Manufacture and Installation Phase
Figure 31 Wind Turbine Rotor Blade: Porter’s Five forces Analysis
Figure 32 Wind Turbine Blade Market Share (Value), By Material, 2013
Figure 33 Global Wind Turbine Blade Market Share (Value), By Blade Length, 2013
Figure 34 Wind Turbine Blade Market, 2012-2019 (No. of Blades)
Figure 35 Annual Installed Wind Energy Market Share, By Region, 2013
Figure 36 Middle East & African Annual Wind Energy Market Share By Country, 2013
Figure 37 Asia-Pacific Annual Wind Energy Market Share By Country, 2013
Figure 38 Europe Annual Wind Energy Market Share (Volume) By Country, 2013
Figure 39 North American Annual Wind Energy Market Share, By Country, 2013
Figure 40 South American Annual Wind Energy Market Share, By Country, 2013
Figure 41 Companies Adopted Contracts & Agreements as the Key Growth Strategy Over the Last Three Years
Figure 42 Siemens Grew at the Highest Rate Between 2010-2013
Figure 43 Wind Turbine Rotor Blade Market Share: Top 4 Companies vs. Others in 2013
Figure 44 Battle for Market Share: Contracts and Agreements is the Key Strategy
Figure 45 Market Evolution Framework – Significant Contracts & Agreements Has Fueled Growth in 2012 to 2014
Figure 46 Geographic Revenue Mix of the Top 5 Market Players
Figure 47 Sinoma: Business Overview
Figure 48 China National Materials Company Limited (Sinoma): SWOT Analysis
Figure 49 Gamesa S.A.: Company Snapshot
Figure 50 Gamesa S.A.: SWOT Analysis
Figure 51 General Electric: Company Snapshot
Figure 52 General Electric: SWOT Analysis
Figure 53 Siemens AG: Company Snapshot
Figure 54 Siemens AG: SWOT Analysis
Figure 55 Sinoi GMBH: Company Snapshot
Figure 56 Sinoi GMBH: SWOT Analysis
Figure 57 Suzlon Energy Limited: Company Snapshot
Figure 58 Suzlon Energy Limited: SWOT Analysis
Figure 59 Vestas Wind Systems A/S: Company Snapshot
Figure 60 Vestas Wind Systems A/S: SWOT Analysis
Figure 61 Acciona SA: Company Snapshot
Figure 62 Acciona SA: SWOT Analysis
Figure 63 Enercon GMBH: Company Snapshot
Figure 64 Nordex SE: Company Snapshot
Figure 65 Powerblades GMBH: Company Snapshot
Figure 66 SGL: Company Snapshot

Order by Fax - using the form below
Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Wind Turbine Rotor Blade Market by Material, by Blade Size and Geography - Global Trends and Forecasts to 2019
Web Address: http://www.researchandmarkets.com/reports/1848967/
Office Code: SC

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Product Format</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User</td>
<td>USD 5650</td>
</tr>
<tr>
<td>Electronic (PDF) - 1 - 5 Users</td>
<td>USD 6650</td>
</tr>
<tr>
<td>Electronic (PDF) - Site License</td>
<td>USD 8150</td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide</td>
<td>USD 10000</td>
</tr>
</tbody>
</table>

* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr  [ ] Mrs  [ ] Dr  [ ] Miss  [ ] Ms  [ ] Prof
First Name: ___________________________________________ Last Name: ___________________________________________
Email Address: * ______________________________________
Job Title: ____________________________________________
Organisation: _________________________________________
Address: _____________________________________________
City: _________________________________________________
Postal / Zip Code: ____________________________________
Country: _____________________________________________
Phone Number: ________________________________________
Fax Number: __________________________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by Wire Transfer: Bank details will be provided on the invoice which you will receive after you place your order with us.

If you have a Marketing Code please enter it below:

Marketing Code: ______________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World