



Courtesy of Aegis Renewable Energy



Courtesy of TVI Group



Courtesy of Charles Newcomb

Preview of 2014 Distributed Wind Market Report

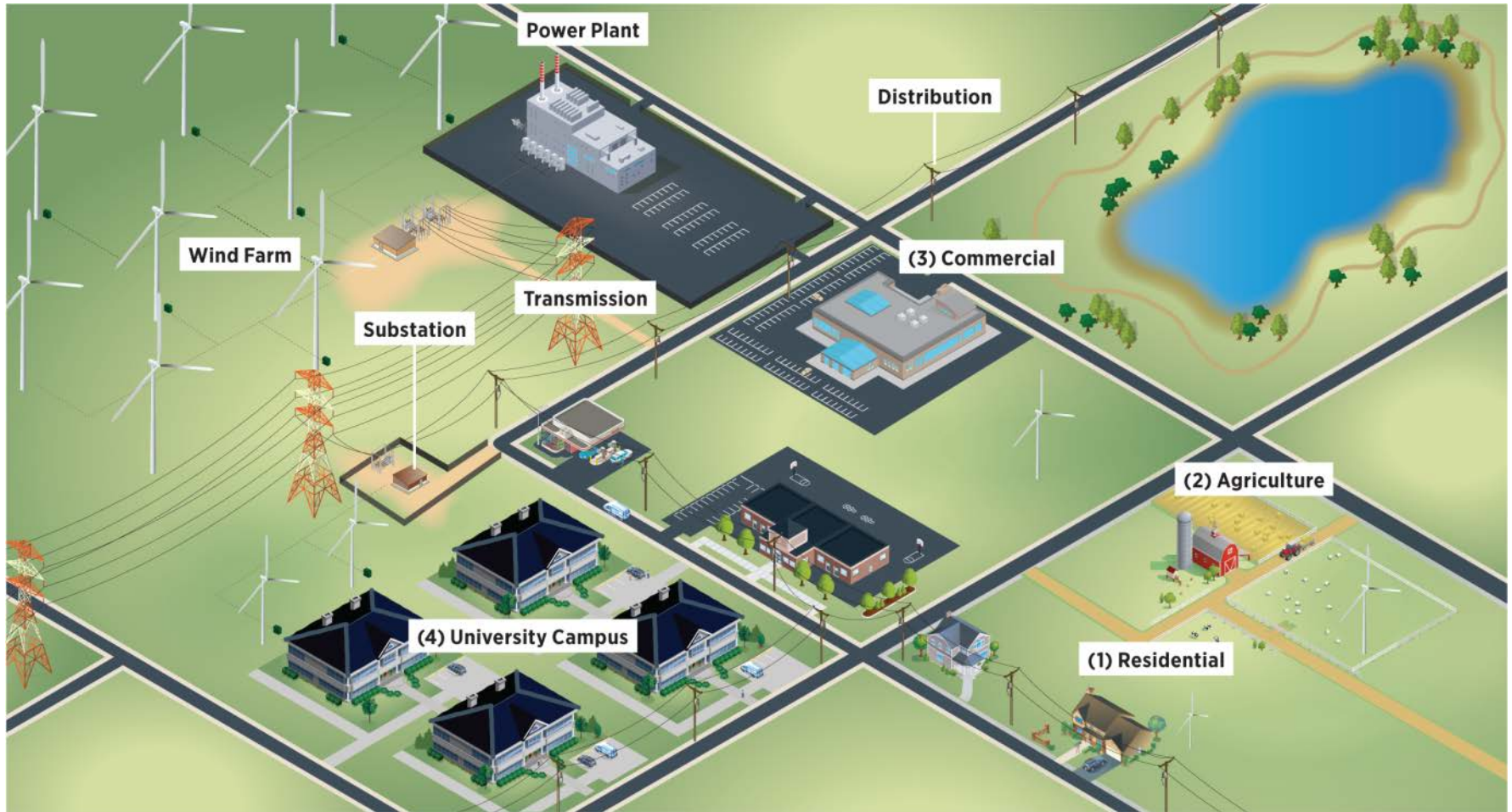
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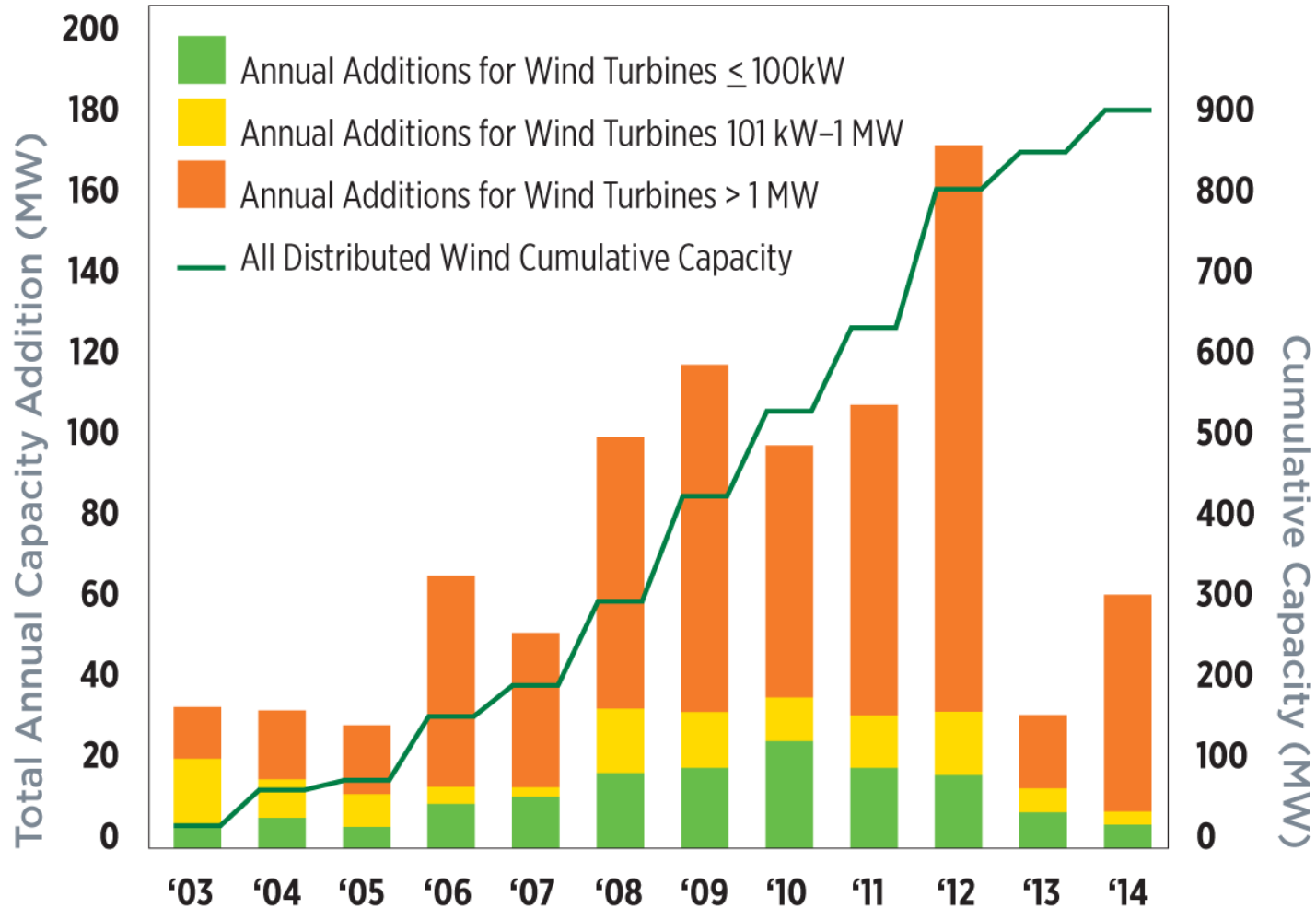
What is Distributed Wind?



Graphic: NREL / David Schulz

Preview presentation. See published report for final graphics and data.

Cumulative Installed Capacity



Preview presentation. See published report for final graphics and data.

50

Number of Companies
Sent Data Request Forms

24

Number of Companies
Who Replied

15

Number of Companies
Who Had 2014 U.S. Sales

11

Number of Companies
Who Had 2014 U.S. Sales
and are U.S.-based

7

Number of U.S.-based
Companies Who Had
2014 Exports

88

Number of Agencies
Sent Data Request Forms
or Contacted

56

Number of Agencies
Who Replied

19

Number of Agencies
Who Had Records
of 2014 DW Installations

24

States PNNL has Records
of 2014 DW Installations

Preview presentation. See published report for final graphics and data.

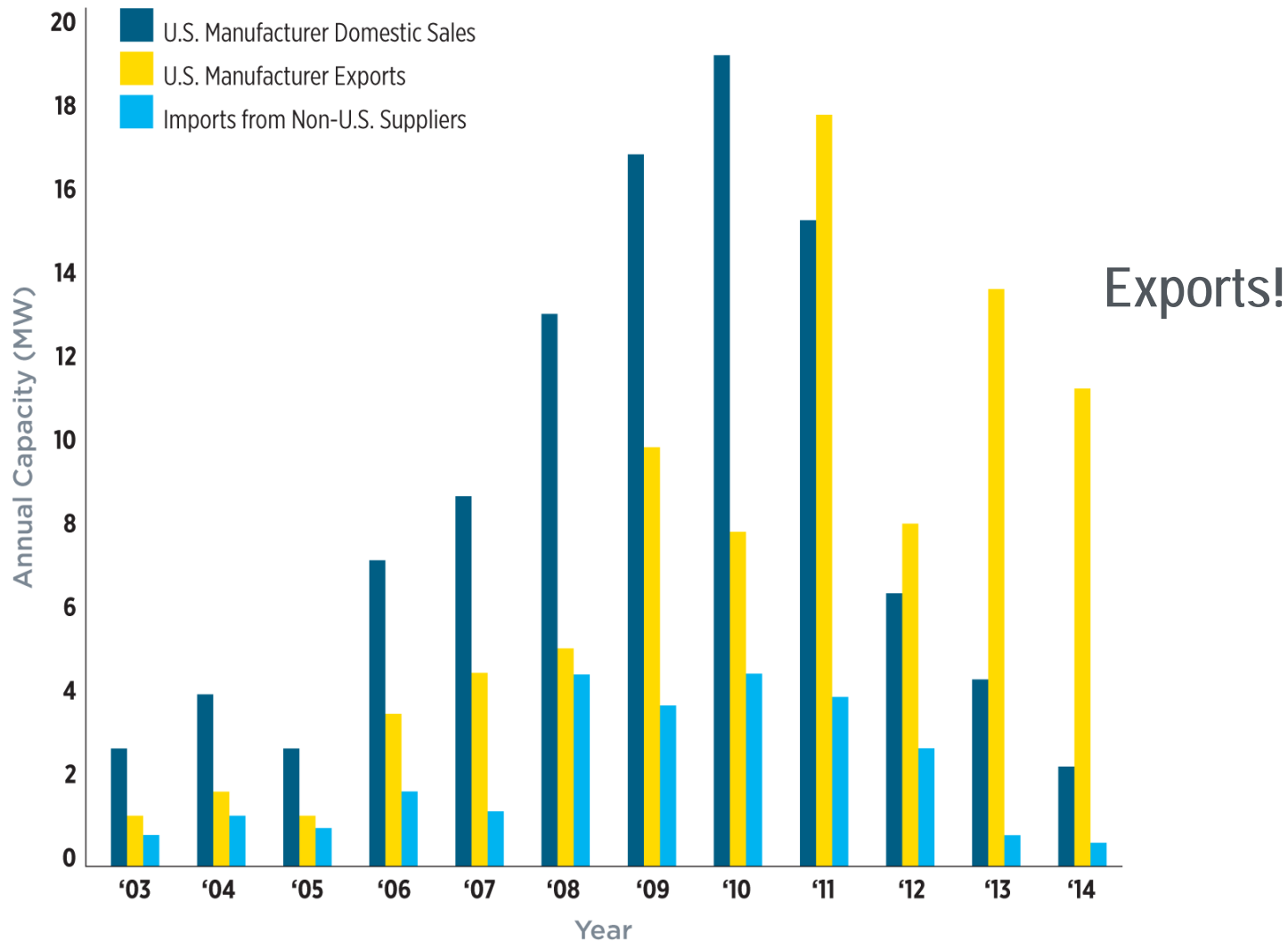
Large-Scale Turbine Market Players

Figure 53
Wind Turbine Manufacturers Installing Turbines in the U.S., by Year

2006	2007	2008	2009	2010	2011	2012	2013	2014
GE Energy	GE Energy	GE Energy	GE Energy	GE Energy	GE Energy	GE Energy	GE Energy	GE Energy
Siemens	Vestas	Vestas	Vestas	Siemens	Vestas	Siemens	Siemens	Siemens
Vestas	Siemens	Siemens	Siemens	Gamesa	Siemens	Vestas	Sany	Vestas
Mitsubishi	Gamesa	Suzlon	Mitsubishi	Suzlon	Suzlon	Gamesa	Vestas	Nordex
Suzlon	Mitsubishi	Gamesa	Suzlon	Mitsubishi	Mitsubishi	Senvion	EWT Americas	Gamesa
Gamesa	Suzlon	Mitsubishi	Gamesa	Vestas	Nordex	Mitsubishi	PowerWind	PowerWind
	Clipper	Clipper	Clipper	Acciona	Clipper	Nordex	Vergnet	RRB Energy Ltd.
	Nordex	Vestas	Senvion	Clipper	Senvion	Clipper		Refurbished
		Senvion	Vestas	Senvion	Gamesa	Acciona		
		Fuhrlander	Clipper	DeWind	Alstom	Suzlon		
		DeWind	Nordex	Nordex	Sany	Goldwind		
		AWE	DeWind	Northern Power	VENSYS	DeWind		
		VENSYS	AAER/Pioneer	Samsung	Samsung	CCWE		
		RBB	Fuhrlander	Nordic	Goldwind	Guodian		
		Entegry	Goldwind	DanWind	Hyundai	Sinovel		
		DES	Northern Power	EWT Americas	Nordtank (refurbished)	Hyundai		
		Northern Power	VENSYS	Turbowinds	Kenersys	HZ Windpower		
			RRB Energy Ltd.	AAER/Pioneer	Northern Power	PowerWind		
			EWT Americas	PowerWind	Sinovel	VENSYS		
			Elecon	Elecon	Unison	EWT Americas		
			WES		Nordic	Kenersys		
			Norwin		PowerWind	Aeronautica		
					Aeronautica	Sany		
					Elecon	Leitner-Poma		
					Turbowinds	Turbowinds		
					WES	Vergnet		
					Siva	Siva		
						Refurbished		

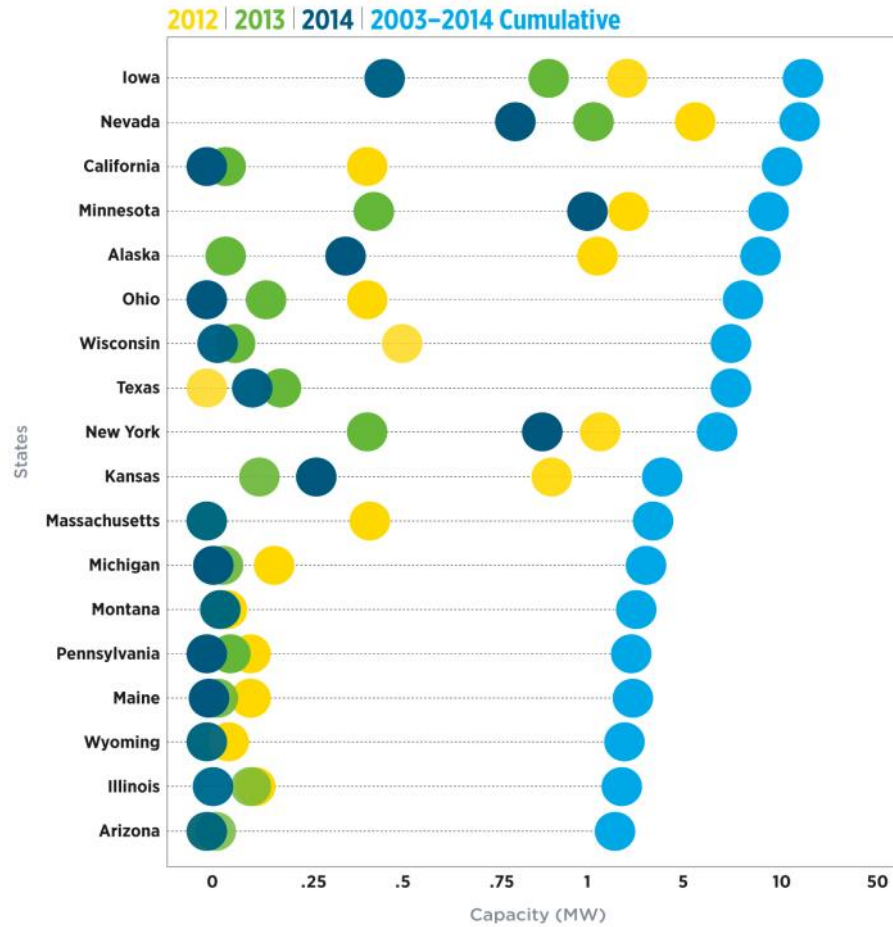
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U.S. Small Wind Sales



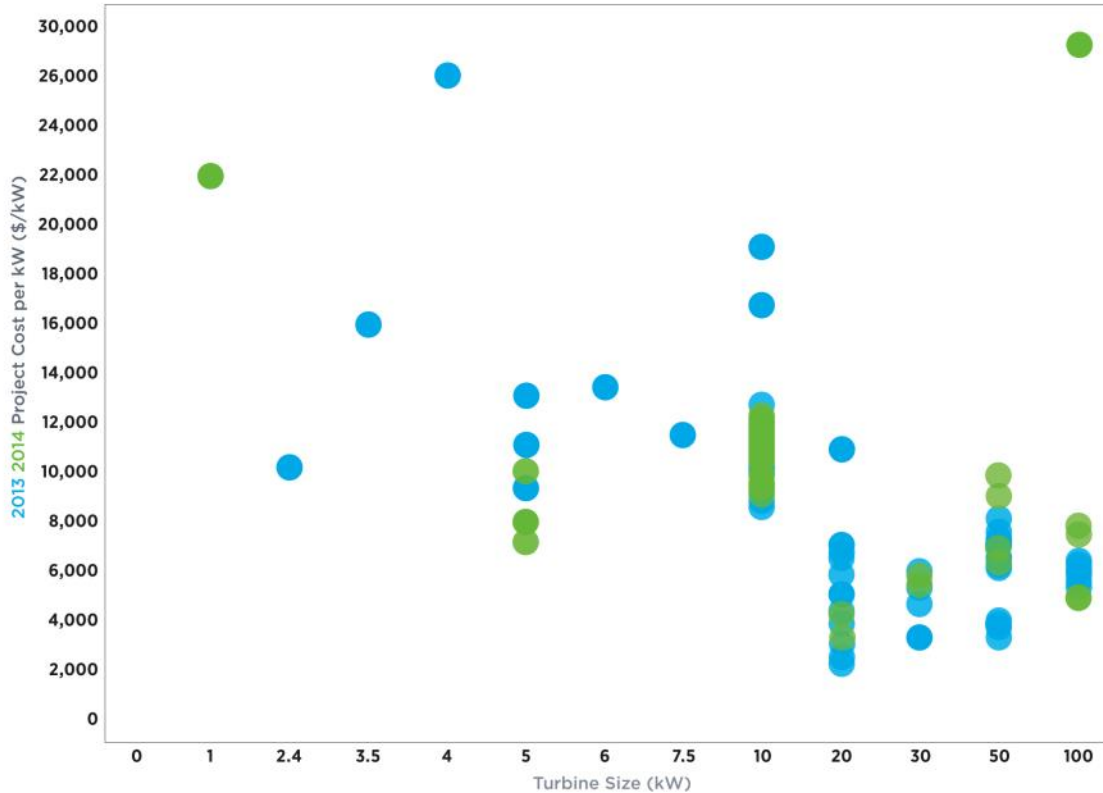
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Top States for Small Wind



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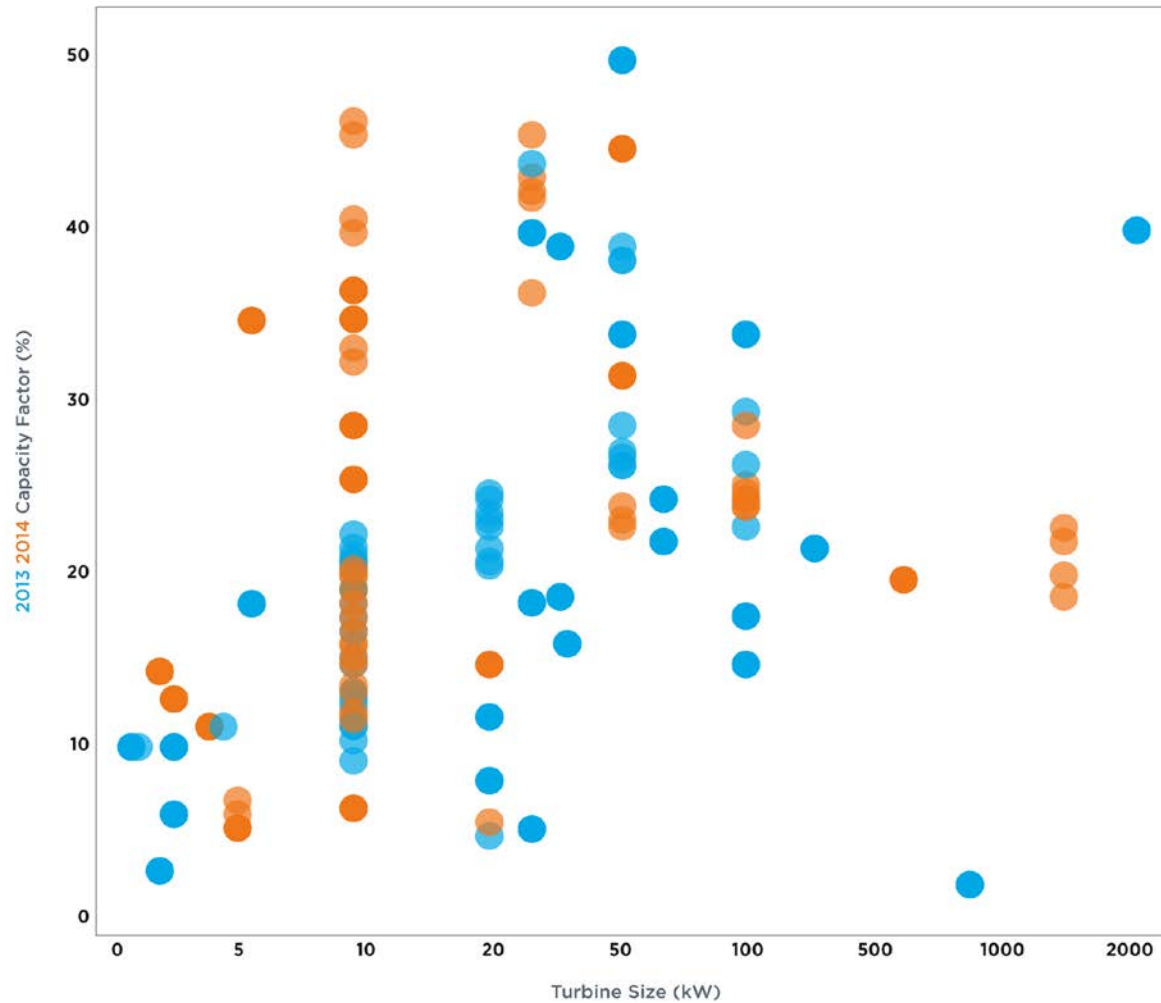
Small Wind Project Costs



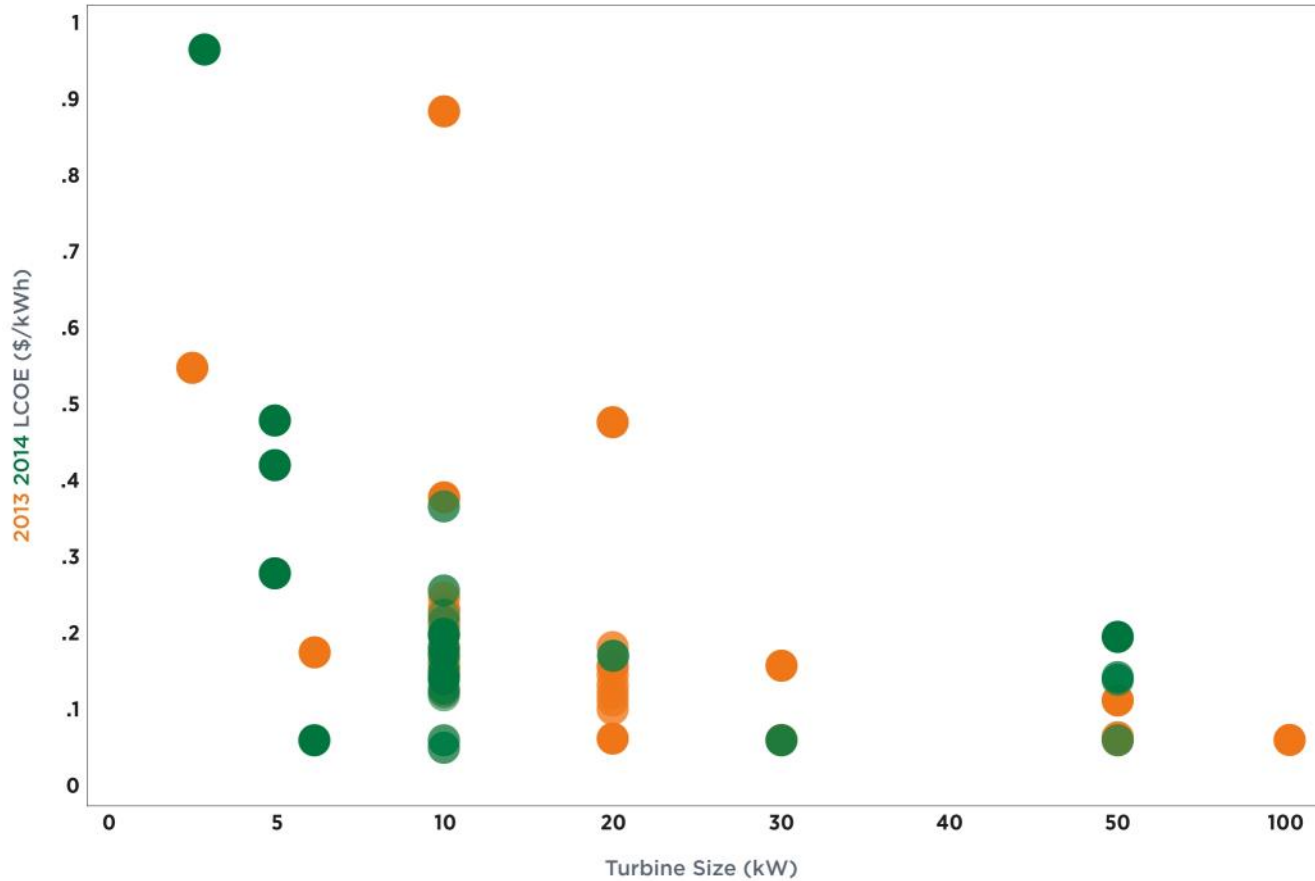
Turbine Size (kW)	1	2.4	3.5	4	5	6	7.5	10	20	30	50	100
Turbines with Reported Project Costs	2	3	1	14	6	1	1	46	15	6	21	13
Total Sample Size (kW)	2	7.2	3.5	56	30	6	7.5	460	300	180	1050	1300

Preview presentation. See published report for final graphics and data.

Distributed Wind Capacity Factors

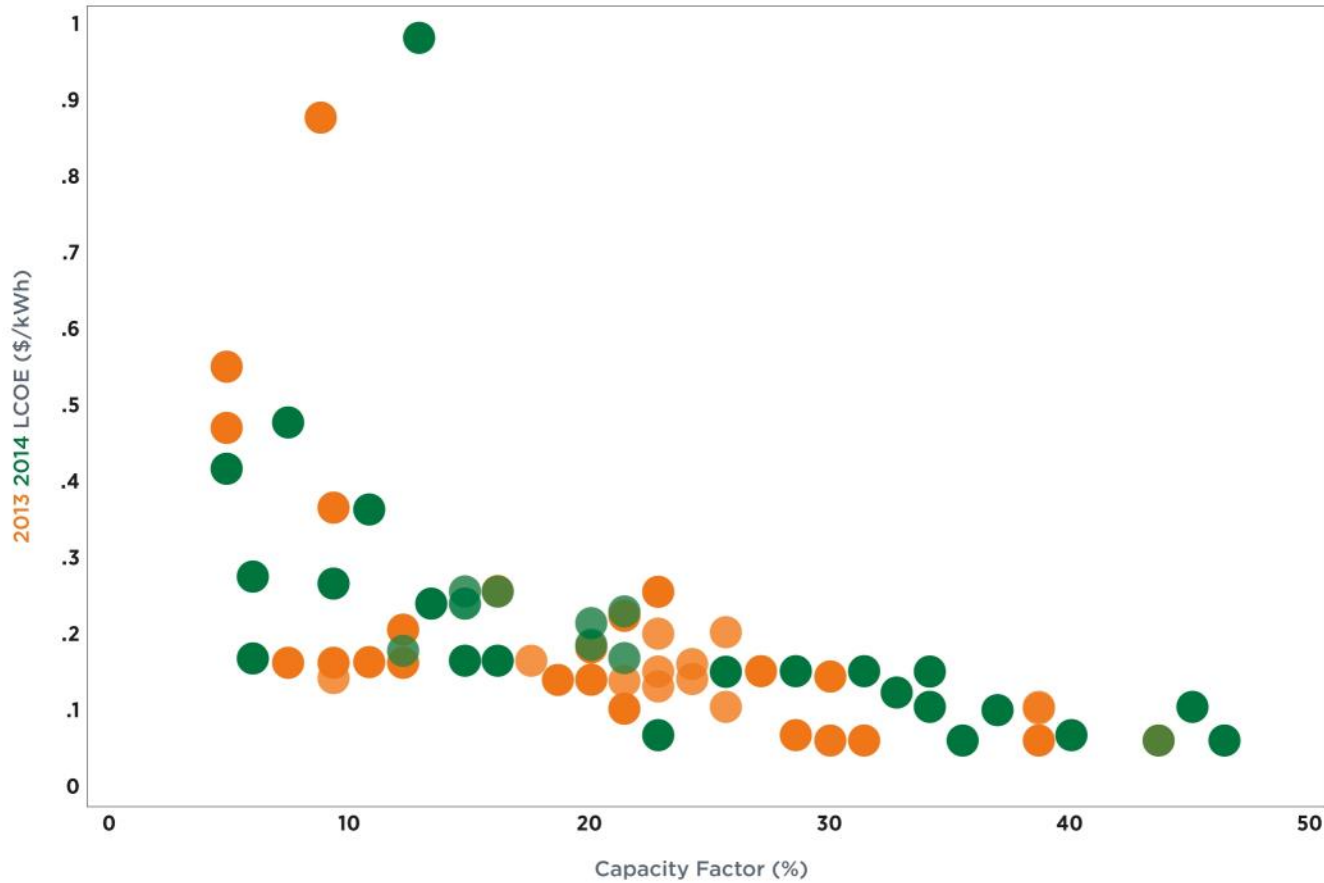


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LCOE and Capacity Factor



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- Effective February 2, 2015, small wind turbines must meet AWEA or IEC Standards to be eligible for the Federal ITC
- More Projects with Mid-Size Turbines Expected in 2015
- Thoughts from Industry Stakeholders
 - Exports will continue to be significant
 - Solar PV still remains a competitor
 - Non-US manufacturers have mixed feelings about US market
 - Leasing model will continue to expand the domestic market



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- 2014 Distributed Wind Market Fact Sheet
- Full report will be available this summer at <http://energy.gov/eere/wind/downloads/2014-distributed-wind-market-report>

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