

## Upcoming GWEC events

- China Wind Power - 16-19 October 2019
- WindAc Africa and Windaba - 5-8 November 2019
- Mexico WindPower - 21-22 March 2019
- Brazil Windpower - 28-30 May 2019



# Doing Business In South Africa

GWEC Webinar

9 October 2018

C0 Members



C1, C2 and C3 Members

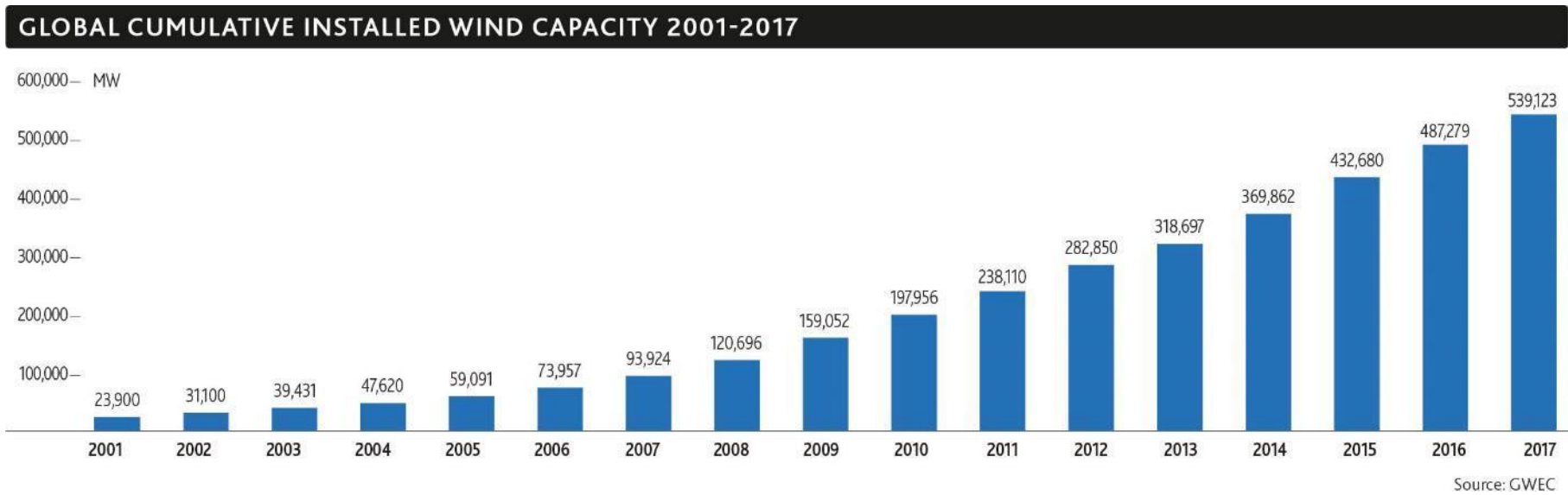


Associations



GWEC – Uniting the global wind industry and its representative associations

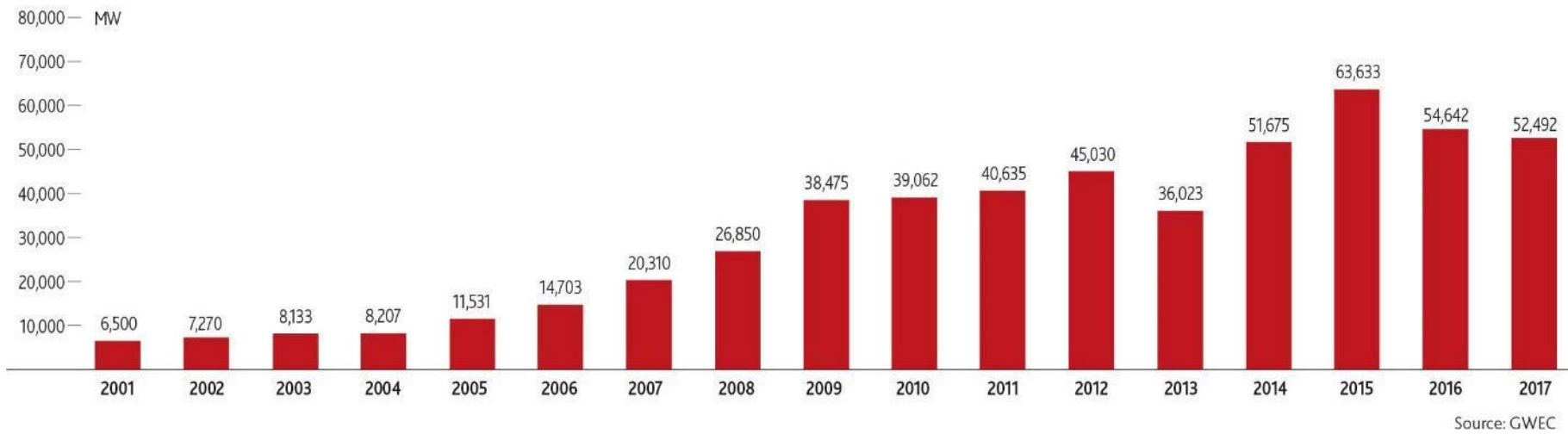
**2017 growth: 11%**



**17 yr avg. growth: 22.6%**

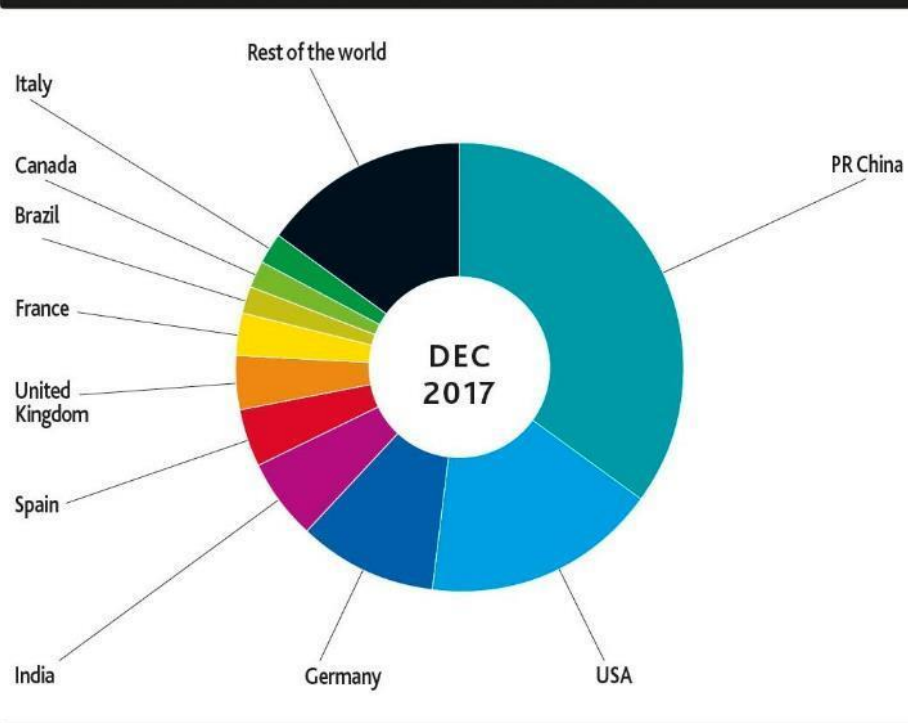
**2017 growth: -3.8%**

**GLOBAL ANNUAL INSTALLED WIND CAPACITY 2001-2017**



**17 yr avg. growth: 19%**

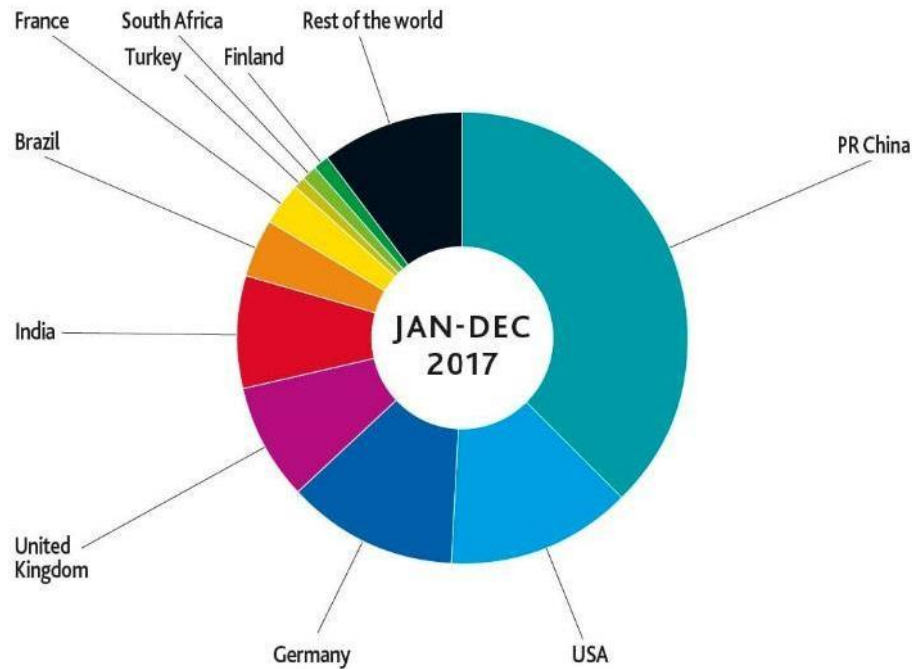
**TOP 10 CUMULATIVE CAPACITY DEC 2017**



Country	MW	% Share
PR China	188,392	35
USA	89,077	17
Germany	56,132	10
India	32,848	6
Spain	23,170	4
United Kingdom	18,872	4
France	13,759	3
Brazil	12,763	2
Canada	12,239	2
Italy	9,479	2
Rest of the world	82,391	15
<b>Total TO P10</b>	<b>456,732</b>	<b>85</b>
<b>World Total</b>	<b>539,123</b>	<b>100</b>

Source: GWEC

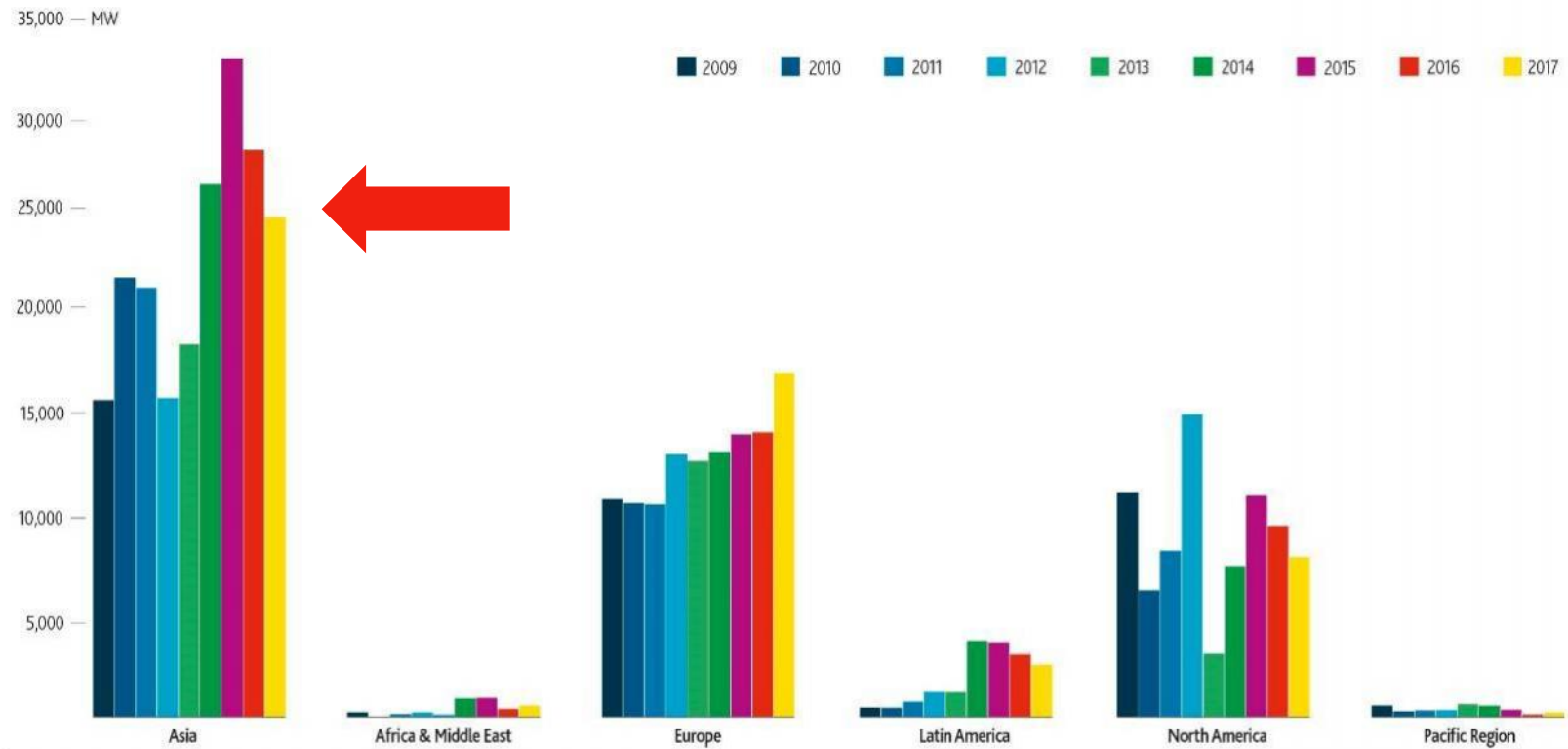
**TOP 10 NEW INSTALLED CAPACITY JAN-DEC 2017**



Country	MW	% Share
PR China	19,660	37
USA	7,017	13
Germany	6,581	12
United Kingdom	4,270	8
India	4,148	8
Brazil	2,022	4
France	1,694	3
Turkey	766	1
South Africa	618	1
Finland	535	1
Rest of the world	5,182	10
<b>Total TOP 10</b>	<b>47,310</b>	<b>90</b>
<b>World Total</b>	<b>52,492</b>	<b>100</b>

Source: GWEC

**ANNUAL INSTALLED CAPACITY BY REGION 2009-2017**

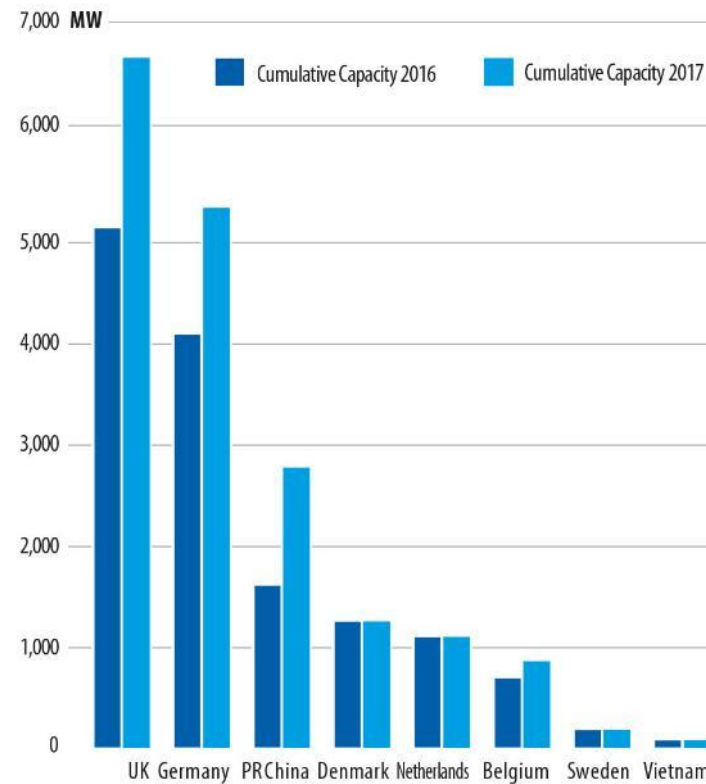


	2009	2010	2011	2012	2013	2014	2015	2016	2017
Asia	15,507	21,481	20,981	15,624	18,252	26,058	33,962	27,721	24,412
Africa & Middle East	251	153	8	131	240	934	953	418	618
Europe	10,660	10,466	10,393	12,862	12,524	12,988	13,831	13,926	16,803
Latin America	471	459	771	1,248	1,240	3,744	3,678	3,078	2,578
North America	11,008	6,208	8,137	14,807	3,112	7,382	10,829	9,359	7,836
Pacific Region	578	294	345	358	655	568	381	140	245

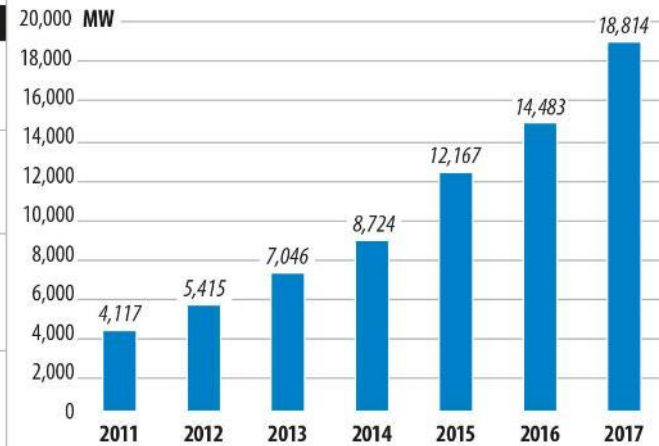
Source: GWEC



**GLOBAL CUMULATIVE OFFSHORE WIND CAPACITY IN 2017**



**ANNUAL CUMULATIVE CAPACITY (2011-2017)**



	UK	Germany	PRChina	Denmark	Netherlands	Belgium	Sweden	Vietnam	Finland	Japan	S Korea	US	Ireland	Taiwan	Spain	Norway	France	Total
<b>Total 2016</b>	5,156	4,108	1,627	1,271	1,118	712	202	99	32	60	35	30	25	0	5	2	0	<b>14,483</b>
<b>New 2017</b>	1,680	1,247	1,161	0	0	165	0	0	60	5	3	0	0	8	0	0	2	<b>4,331</b>
<b>Total 2017</b>	6,836	5,355	2,788	1,271	1,118	877	202	99	92	65	38	30	25	8	5	2	2	<b>18,814</b>

Source: GWEC

**MARKET FORECAST 2018-2022**



Source: GWEC

## New Markets



## Conclusions

- Despite China slowdown, solid market. Records in Europe, India and for offshore. Policy 'gaps' and uncertainty affecting global growth. Not all auctions are created equal. Transition to a fully market-based industry puts increased price pressure up and down the supply chain.
- Expect more or less flat 2018, with ups (Argentina, Mexico, Chile, Australia, etc) balancing downs (Germany, UK, India, etc.). Substantial growth from 2019, reaching 60GW/annum by 2020 and ending the forecast period with 840 GW.
- Technology evolution continues, but incrementally, not spectacularly – most obvious in increased capacity factors. Offshore, size is spectacular, where we now have 9+ MW machines... 'double digit' turbines ~~soon~~ *now!*
- Costs both on and offshore continue to come down. Passing the first tipping point and starting to pass the second in some countries.
- Close to 6% of global electricity supply now, should be 7-8% by 2020, 18-20% by 2030, around 1/3 by 2050 if we are to get to grips with the climate problem.



# WINDABA

**7-8 NOVEMBER 2018**  
CAPE TOWN, SOUTH AFRICA





**CHINA WIND POWER 2018** 17-19 October  
Beijing, China

**CHINA WIND POWER**

**CHINA WIND POWER 2018**  
October 17-19, Beijing, China  
China International Exhibition Center(New Venue)

The banner features a large, stylized '2018' in the background. The '2' is orange and yellow, the '0' is blue and white, and the '8' is yellow and white. The text is in white and yellow on a dark grey background.

[Chinawind.org.cn](http://Chinawind.org.cn)



Thank you!

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