

I Overview

- Government policies and incentives in Asia Pacific

To achieve the target for renewable energy, each government has released a series of policies and incentives on wind power industry development.

- Market value of wind power in Asia Pacific

TABLE I-2 Market value of wind equipment in Asia Pacific in 2007, by country and region

Country	Unit cost of wind turbine USD/MW	New capacity 2007, MW	Market value, million USD
China			
India			
Japan			
Australia			
New Zealand			
Taiwan			
South Korea			
Total			

*The data as of Mar.2007 to Mar. 2008.

Source: CCM International Ltd.

TABLE I-3 Market value of wind power generation in Asia Pacific in 2007, by country and region

Country	On-grid price, USD/kWh	Wind electricity generated, GWh	Market value, million USD
India			
China			
Japan			
Australia			
New Zealand			
Taiwan			
South Korea			
Philippines			
Total			

* The average on-grid price of the price in different states or provinces; ** the price of Renewable Energy Certificate in Australia.

Source: CCM International Ltd.

- Installed capacity of wind power in Asia Pacific

TABLE I-4 Cumulative installed capacity of wind power in Asia Pacific, 2007

No.	Country	Cumulative installed capacity, MW	Market share
1	India		
2	China		
3	Japan		
4	Australia		
5	New Zealand		
6	Taiwan		
7	South Korea		
8	Philippines		
9	Thailand		
10	Sri Lanka		
11	Bangladesh		
12	Vietnam		
13	Malaysia		
Total			

Source: CCM International Ltd.

- Wind turbine supply in Asia Pacific

Due to different wind energy resource and development of wind power, the installed wind turbine size in every country and region varies a lot.

TABLE I-5 Comparison of wind turbine size in main countries and regions in Asia Pacific, by cumulative installed capacity, by 2007

Turbine size/Country	<600 kW	600~999 kW	1,000~1,499 kW	1,500~1,999 kW	≥2,000 kW
India					
China					
Japan					
Australia					
New Zealand					
Taiwan					
South Korea					
Other countries					

Source: CCM International Ltd.

TABLE I-6 Market of top three wind turbine suppliers in Asia Pacific, 2007

Country	Main installed wind turbine size, kW			Cumulative installed capacity, MW		
	Suzlon	Vestas	Enercon	Suzlon	Vestas	Enercon
India						
China						
Australia						
Japan						
New Zealand						
Taiwan						
South Korea						
Philippines						
Total	-	-	-			

TABLE I-7 Main local manufacturers in China, India, South Korea, New Zealand, 2007

No.	Manufacturer	Country	Turbine size, kW	Technique source	Certification
1	Goldwind	China			
9	Suzlon Energy Ltd	India			
15	Unison	South Korea			
16	Hyosung	South Korea			
17	Windflow Technology	New Zealand			

Source: CCM International Ltd.

- **Forecast to 2014**

By the end of 2008, China has been the largest country in wind power development in terms of installed capacity in Asia Pacific region and the fourth in the world, exceeding India. And in the coming years to 2014, China's wind power installed capacity will increase by over [REDACTED] MW at least.

TABLE I-8 Forecast on cumulative installed capacity in Asia Pacific to 2014, MW

Scenario	2008	2009	2010	2011	2012	2013	2014	CAGR 2009~2014, %
Low-growth	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Expected growth	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
High-growth	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Source: CCM International Ltd.

TABLE I-9 Forecast on market value of wind turbine in Asia Pacific to 2014, billion USD

Scenario	2008	2009	2010	2011	2012	2013	2014	CAGR 2009~2014, %
Low-growth	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Expected growth	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
High-growth	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Source: CCM International Ltd.

TABLE I-10 Wind power generated and its market value in Asia Pacific, forecasted to 2014

Scenario	Item	2008	2009	2010	2011	2012	2013	2014	CAGR2009~2014, %
Low growth	Wind power generated, GWh	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
	Market value, billion USD	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Expected growth	Wind power generated, GWh	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
	Market value, billion USD	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
High growth	Wind power generated, GWh	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
	Market value, billion USD	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Source: CCM International Ltd.