

Press Release · Pressemitteilung

Ninth WindEnergy trend:index published: Mood in Germany better than ever before

Hamburg, 05 May 2022 – In the ninth edition of the WindEnergy trend:index, the wind power market received positive ratings for all regions; respondents believe the Ukraine war will only have a short-lived negative impact if any. While the markets in Europe, Asia and North America had been seen in an optimistic light even in the previous surveys and have largely been able to continue at these levels, Germany has achieved a strong improvement of its values compared to the last survey in autumn 2021: After the results were either negative or neutral in recent years, the current and future market situation is now seen as very positive.

These are the overall results of the new WindEnergy trend:index (WETix) which has been prepared at six-month intervals since 2018. It is published jointly by WindEnergy Hamburg, the global onshore and offshore wind energy event, and wind:research, the leading market research institute for wind energy. Nearly 900 respondents have taken part in the current survey, contributing their assessments of the development of the global onshore and offshore wind industry. All in all, more than 9,400 experts have participated in WETix surveys since 2018.

Steep upwards trend for Germany: current and future market situation receives (very) positive assessment

While in autumn 2021 the German onshore wind energy market was judged unenthusiastically or even with slight pessimism, respondents are now seeing a very positive environment; Germany has caught up with the other regions in terms of positive ratings. With regard to expectations for the future of the onshore wind market, Germany has likewise achieved its best results by far since the beginning of WETix surveys. Contrary to the all-time low seen in the autumn 2019 survey, the market for onshore wind in Germany is now considered to be very good, achieving similarly positive results as Europe, North America and Asia.

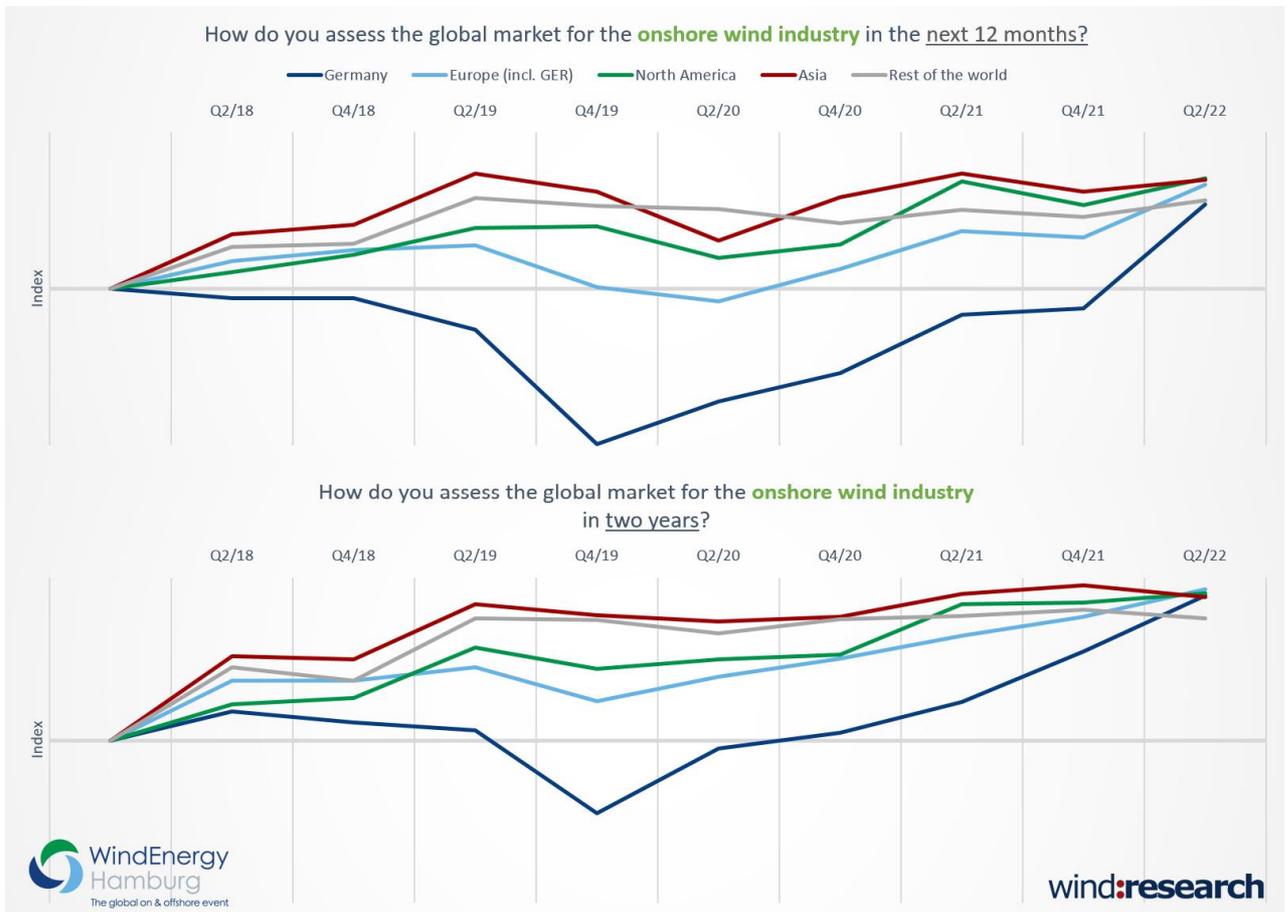


Figure 1: Assessment of the global market for onshore wind energy in the next twelve months and in two years

On the question about the current situation of the offshore wind industry, all regions show significant improvements, with results in the positive to very positive quadrant. Here again, Germany is showing the strongest improvement: the values are now similar to those for Asia, North America and Europe. Not only that, but expectations for the future of offshore wind are very optimistic, as well: Asia, Europe and North America and, as of this new survey, Germany are all neck-and-neck, hovering close to the maximum rating. The rest of the world remains in the positive midfield.

Fears of negative impact of Ukraine war only relevant for the short term

While expectations for both, the next twelve months and the coming two years are positive across all regions, about 50 to 55per cent of survey participants fear that the Ukraine war may have a negative to very negative short-term impact on the wind energy industry. However, between 25 and 30per cent actually expect a positive impact, while roughly 20per cent do not anticipate any major consequences.

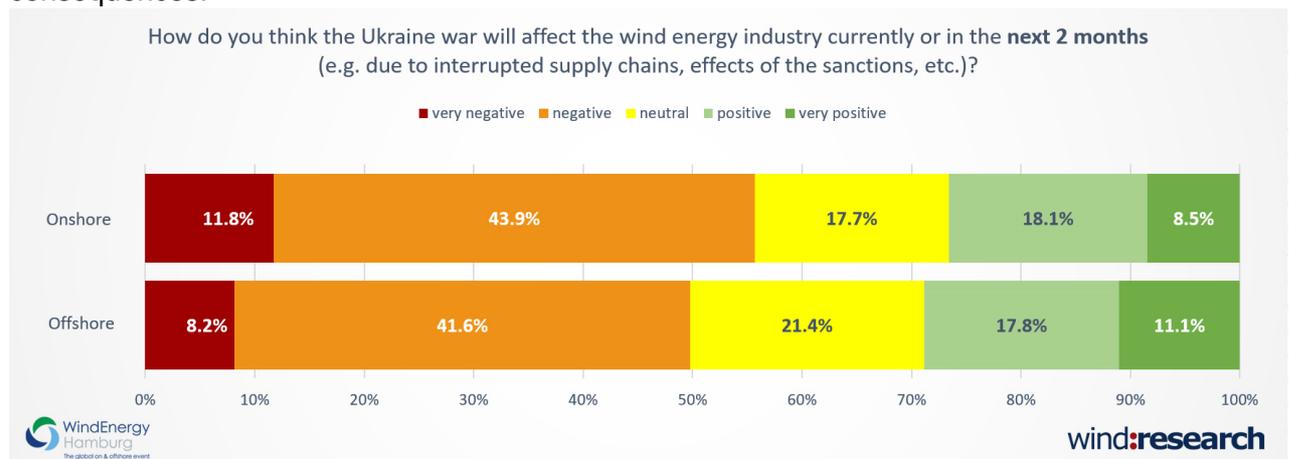


Figure 2: Short-term impact of Ukraine war on wind energy industry

All in all, more than 55per cent of respondents see a high to very high likelihood that the production of green hydrogen will play a key role for wind energy over the next two years. These values are at a similarly high level as in past surveys. The mood in terms of the saving potential inherent in new technologies is almost unchanged, remaining in the medium-to-high range; ever since the WETix was first introduced the saving potential in offshore wind energy has been receiving significantly better ratings than for onshore.

WindEnergy Hamburg from 27 - 30 September 2022 –

Every two years one of the most fascinating industries meets for the leading global networking event for wind energy: At WindEnergy Hamburg, which takes place right in the heart of the vibrant northern German port city, around 1,400 companies from 40 countries present their innovations and solutions in ten exhibition halls to up to 35,000 visitors from 100 different nations. Covering 68,500 m² across the exhibition campus, equipment manufacturers and suppliers representing all stages of the onshore and offshore wind energy value chain provide a comprehensive overview of the market. Providers of everything from planning and project design to installation, operation and maintenance, and through to marketing, certification and financing take part to showcase their services. The expo is accompanied by conference sessions featuring top-ranking experts who address the industry's current key topics. The WindEnergy Hamburg team are developing this programme jointly with their partners, including the Global Wind Energy Council (GWEC), the European

organisation WindEurope, the national industry associations VDMA and BWE, leading industry media and exhibitors, among others. From 27 until 30 September 2022 many of the conference sessions will take place free of charge on Open Stages located directly inside the exhibition halls. WindEnergy Hamburg 2022 will for the first time be host to the *H2 Expo and Conference*, the new international meeting place focused on the generation, distribution and use of green hydrogen.

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About wind:research:

The market research institute wind:research prepares market studies and analyses as well as expert reports, through to M&A services for the wind energy sector, delivering detailed insights for strategy development to energy utilities, project developers, operators, component and turbine manufacturers as well as municipal, state and federal governments. In addition, it publishes weekly clippings on a wide range of topics such as hydrogen. For further information please visit: www.windresearch.de.

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About WETix:

The WindEnergy trend: **index**, a mood barometer for the wind industry, is jointly compiled by WindEnergy Hamburg, the world's leading expo for onshore and offshore wind energy, and wind:research, the leading wind energy market research institute. The survey focuses on examining the potential of wind energy, covering both the onshore and offshore segments.

About the survey:

Around 15per cent of respondents work in the offshore segment exclusively. About 41per cent are primarily active in the onshore segment. Roughly 39per cent are involved in both the onshore and offshore segments. 41per cent of respondents work in operation and maintenance. Furthermore, around 38per cent are active in manufacturing as well as planning and project development, and roughly one fifth perform installation-related work. Activities within manufacturing are mostly focused on production of turbines and foundations. About 71per cent of respondents do business in Germany primarily, and around 66per cent are focused on Europe. 30per cent each are active in North America and Asia, and 24per cent in the rest of the world. More than one third of survey participants hold positions in business, corporate or operations management, followed by respondents from sales, R&D and design as well as maintenance and service.