

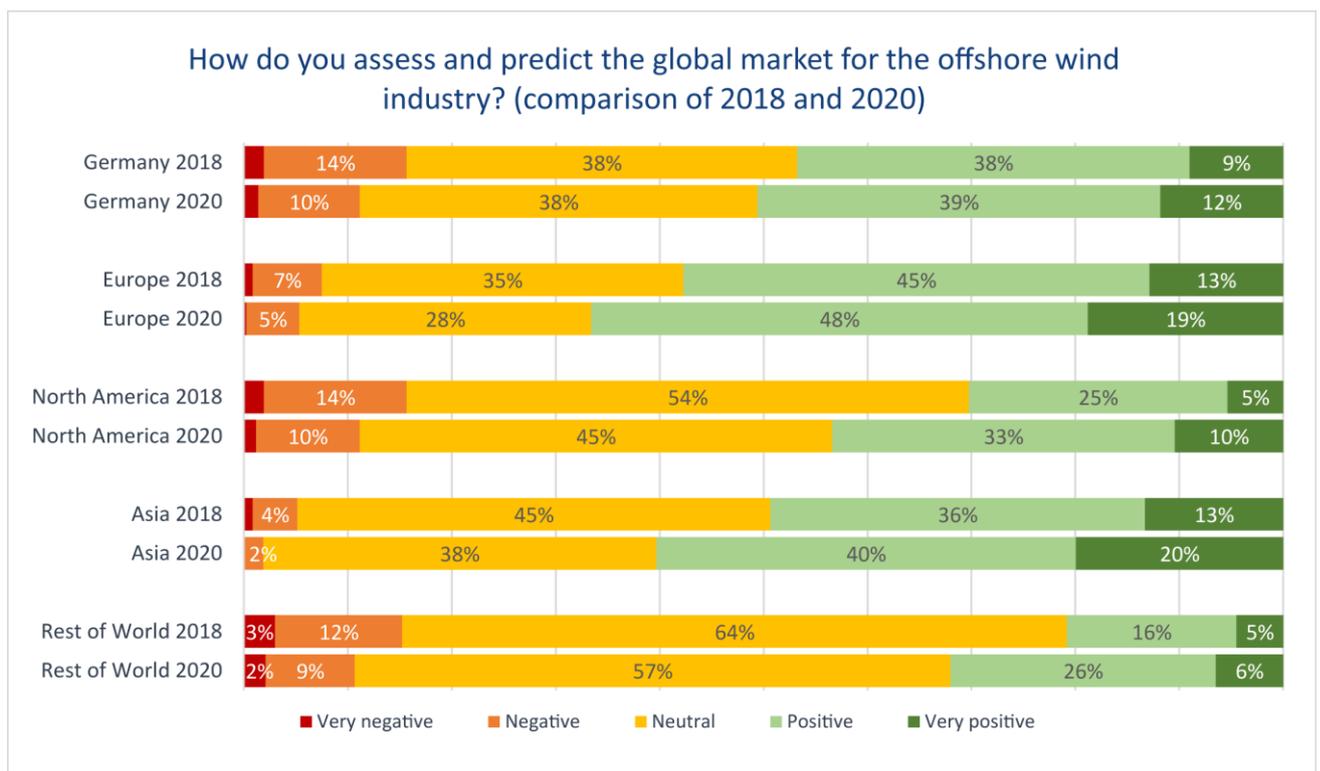
WindEnergy Hamburg 2018 – current trend:index shows increasing focus of wind industry on international markets

Hamburg, 25 May 2018 – The global wind industry continues to look with optimism towards the future in 2018, with positive signals coming from the Asian markets and some European markets. That compensates for the somewhat cautious mood in established markets such as Germany. The market situation in 2020 is expected to be significantly better at global level than it is today. Those are the key findings of the current WindEnergy trend:index (WETI), conducted in March and April this year and presented today (25 May) at a press conference in Hamburg. WindEnergy Hamburg, the world's leading expo for onshore and offshore wind energy, has worked in cooperation with wind:research, the leading market research agency in the wind energy sector, to prepare a mood survey for the industry, measuring a WindEnergy Trend Index (WETI). WindEnergy Hamburg will be held at the Hamburg Messe site from 25 to 28 September. It is a part of the Global Wind Summit 2018.

More than 700 industry experts worldwide participated in the survey, answering 9 questions. The main focus of more than half the companies responding is in Germany and/or Europe; nearly the same number of companies has their main focus in North America, Asia, and the rest of the world (ROW). The majority of companies are active in production, mostly turbine manufacture. Maintenance and servicing, project development and installation, and other areas, are likewise represented in keeping with their respective market shares. The findings were as follows:

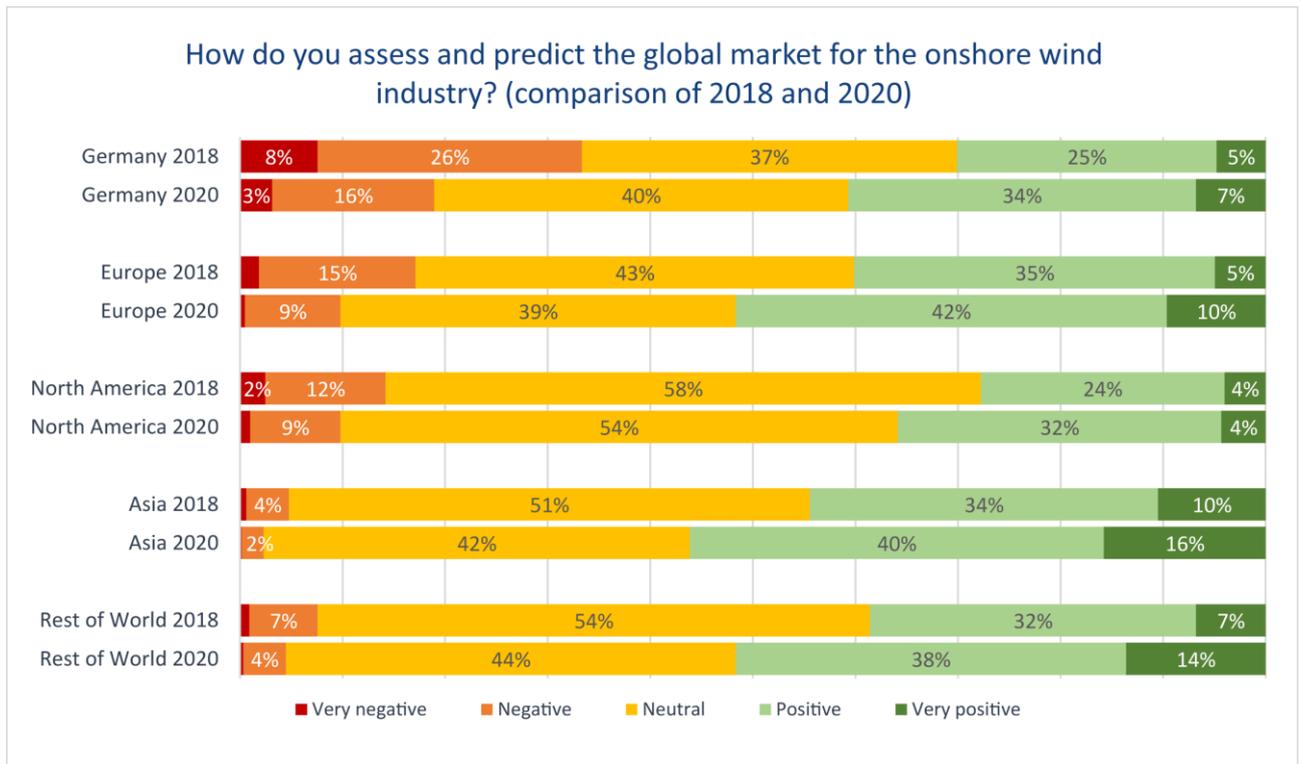
- The mood in terms of **framework conditions** for onshore wind is largely neutral to very good, with more than 90% of opinions in Asia and more than 80% of those in Europe falling in this range. The mood in Germany is slightly below those markets at present. For offshore wind, the mood is substantially better than onshore, especially in Asia.
- The **market situation for onshore** wind is currently assessed as good or very good, particularly in Asia and Europe; here, too, Germany is represented by a neutral, or in some cases even negative assessment.
- The current **market situation for offshore** wind is rated as significantly better; Europe stands out with a largely positive assessment.
- The **future market situation** for onshore wind is assessed as very good to neutral, in particular for Asia and Europe, and also for the rest of the world. North America is regarded as more neutral. The future market situation for offshore wind gets various different assessments compared with onshore – the view in Europe is particularly positive, with 67% positive assessments, followed by Asia with 60%. In both cases that is a substantial improvement compared with the current situation, and significantly better than onshore.

- Potentials for **cost savings**, especially by means of new technologies, are seen by three quarters of respondents, especially in the offshore sector. With onshore, as many as half the respondents take this view.
- A large majority (two thirds) believe that **digital technologies** will lead to optimisation both onshore and offshore. For offshore, 20% feel there is “very high” potential there, while for onshore more “high” potential is seen. New technologies are expected to generate further economies, especially in the offshore sector (compare zero-cent bids in 2017 tender procedures). Nearly three quarters of respondents are convinced of that. For onshore more than half of the respondents take that view.



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Illustration 1: Assessment Current & future market situation offshore



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Illustration 2: Assessment Current & future market situation onshore

The next online survey will be conducted in September and October 2018, to identify a possible change in mood as a consequence of the world's biggest industry meeting at the Global Wind Summit in Hamburg.

WindEnergy Hamburg and Husum Wind

The Global Wind Summit will be held in Hamburg, the capital of the wind industry, from 25 to 28 September 2018. It comprises WindEnergy Hamburg, the world's leading wind industry expo for the onshore and offshore markets, with some 1,400 exhibitors presenting their product innovations and projects and covering the whole of the value chain. In parallel, the Global Onshore and Offshore Conference will be held by WindEurope in the halls of Hamburg Messe. From 10 to 13 September 2019, the Who's Who of the German wind industry will be gathering at HUSUM Wind, partner and next year's most important German wind trade fair. Global market leaders, business pioneers and innovative start-ups: on and offshore businesses will be showing cutting edge technology, product trends and examples of best practice from Germany and the neighbouring EU countries. For more information, please visit windenergyhamburg.com and husumwind.com

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