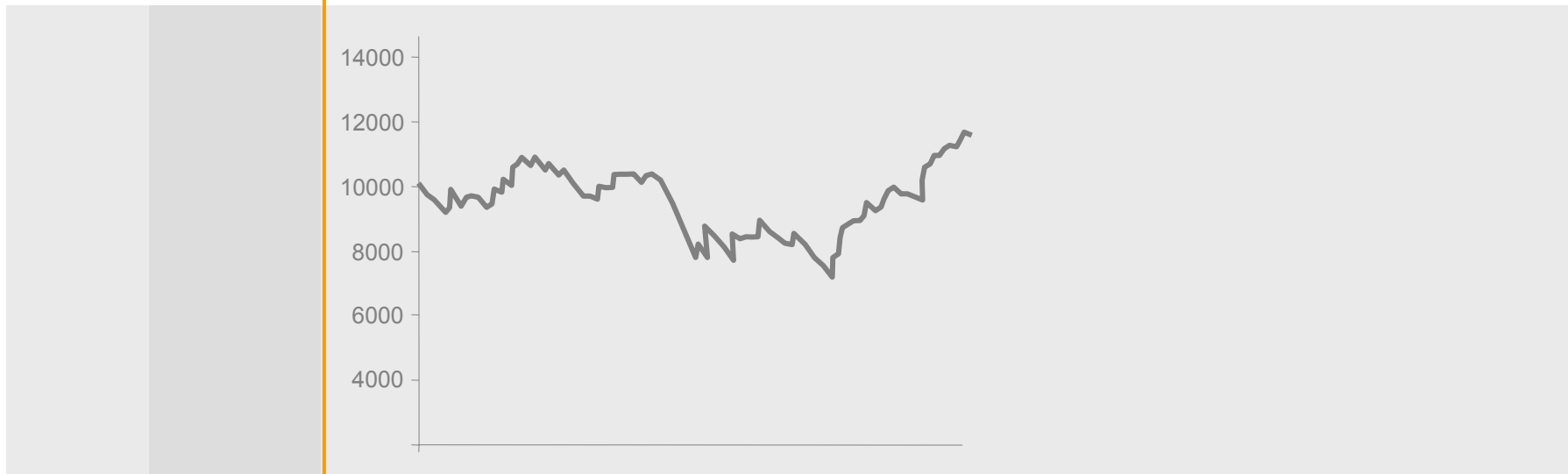


## The 2010 U.S. Wind Industry Monitor *Key Results*



Conducted by Droege & Comp., Inc. and Gibbs & Soell, Inc.,  
May 2010

# Current market circumstances and key survey results

## Overview

### Current Market Circumstances

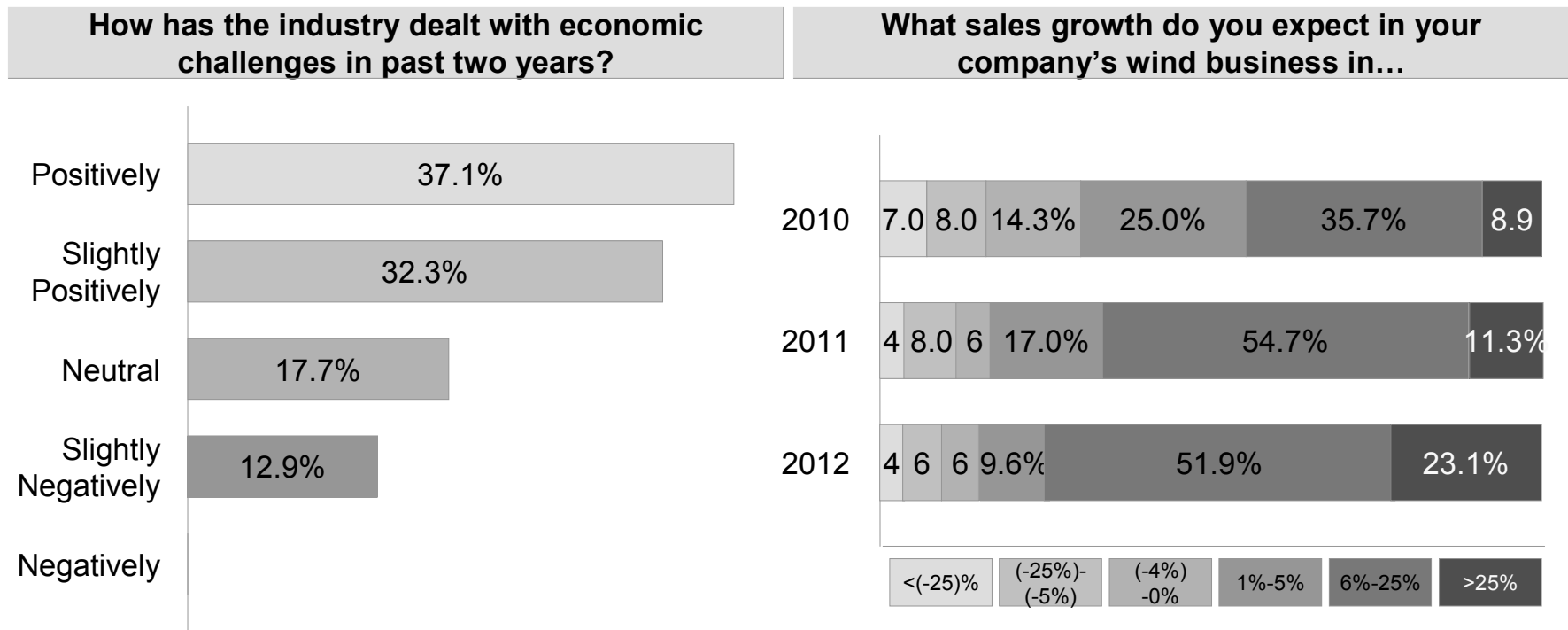
- In 2009, nearly 10GW of wind generation capacity were installed in the U.S. (according to AWEA)
- Compared to 2009 the U.S. market has been slow in 2010; in Q1 2010 only 530 MW were installed in the U.S.
- For 2011 we see an additional capacity of 10-12GW as possible
- Although a strong appetite for projects exists in the U.S. we expect a fierce competition in the next years
- The pressure on wind power prices is high (e.g. rising materials costs, turbine and component shortages) and the market is turning in favor of buyer's
- The size of both wind turbines and wind projects is increasing, although economies of scale are greater for turbine size than turbine volume

### Key Survey Results

- The 2010 U.S. Wind Industry Monitor finds that wind executives view the lack of financing (72.0%), lack of national energy policy (67.0%) and lack of transmission (54.0%) as "important" or "very important" main obstacles to business growth
- Despite the ongoing challenges, most respondents forecasted growth for their U.S. businesses in 2010 (69.6%), 2011 (83.0%) and 2012 (84.6%)
- Generating heightened visibility among stakeholders is critically important for sparking growth in the mature wind industry market; sales and marketing efforts (67.0%) were identified by participants as an "important" or "very important" strategic activity for 2010

# Participants see significant growth in 2011 and 2012

Opinion poll



- 69.4% say the wind industry has dealt with recent economic challenges in a positive manner

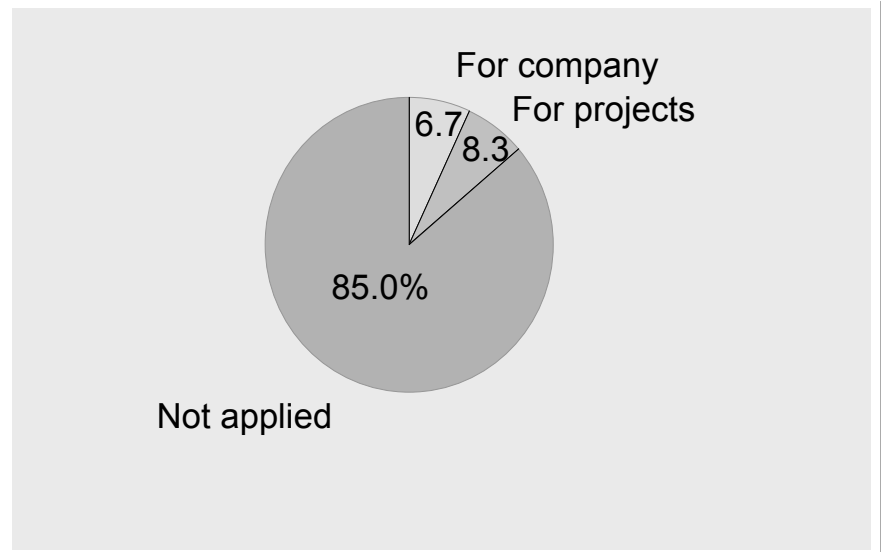
- Sales forecasts grow progressively stronger: 69.6% for 2010, 83.0% for 2011 and 84.6% for 2012

The majority of industry executives indicate a strong growth/ boom in the next few years

# 66% ask for additional support for the U.S. wind industry

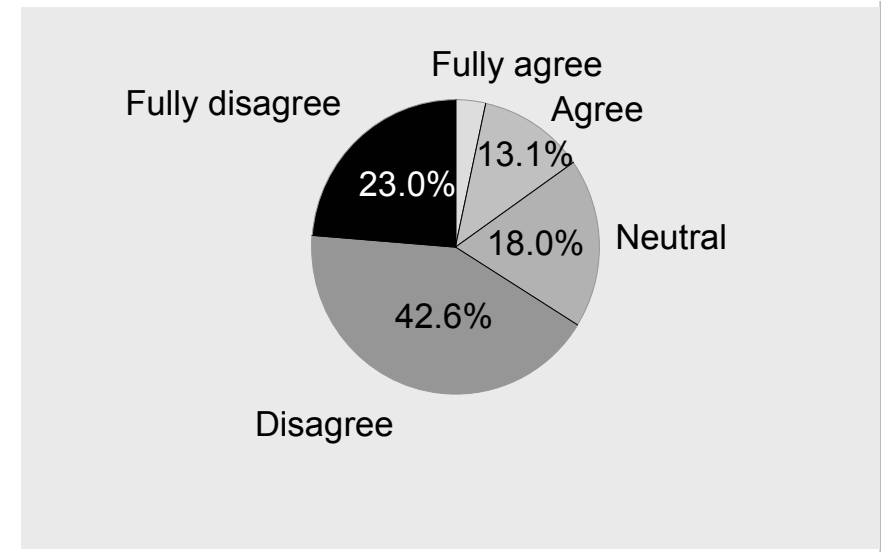
Incentive environment for wind

## Have you applied for stimulus money?



- 15.0% of participants applied for stimulus money
- Of these 15.0%, 6.7% applied for their company and 8.3% for their projects

## Has the government done enough to improve the economic climate for the wind industry?



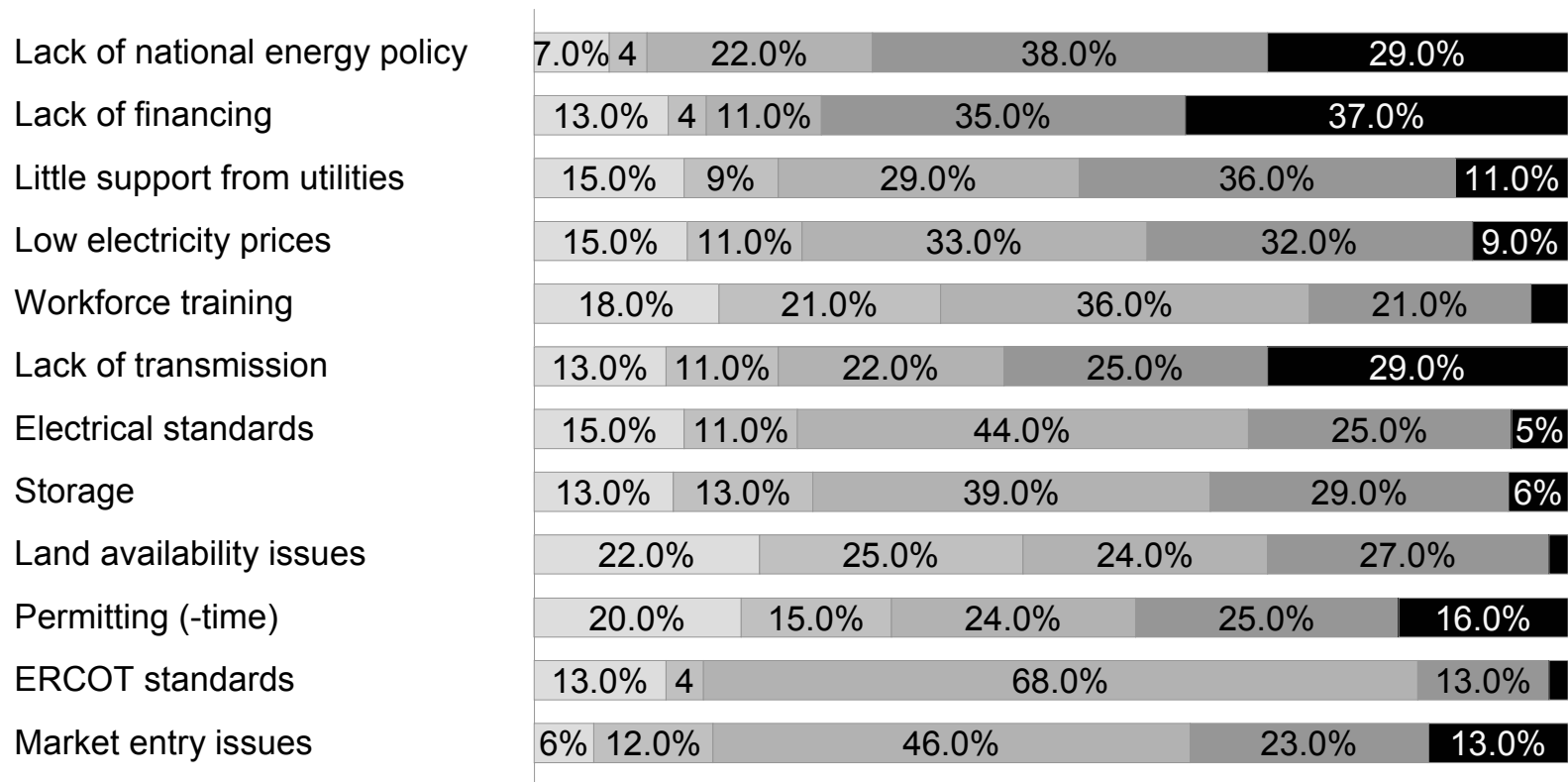
- 65.6% of participants are of the opinion the government has not done enough to improve climate for wind industry
- 16.4% think the government has done enough

The majority did not apply for stimulus and feels the government needs to provide more support

# Lack of credit still crunches wind businesses

Major obstacles for wind industry

## What are major obstacles for your company's wind business?



Key<sup>1</sup>: 1 2 3 4 5

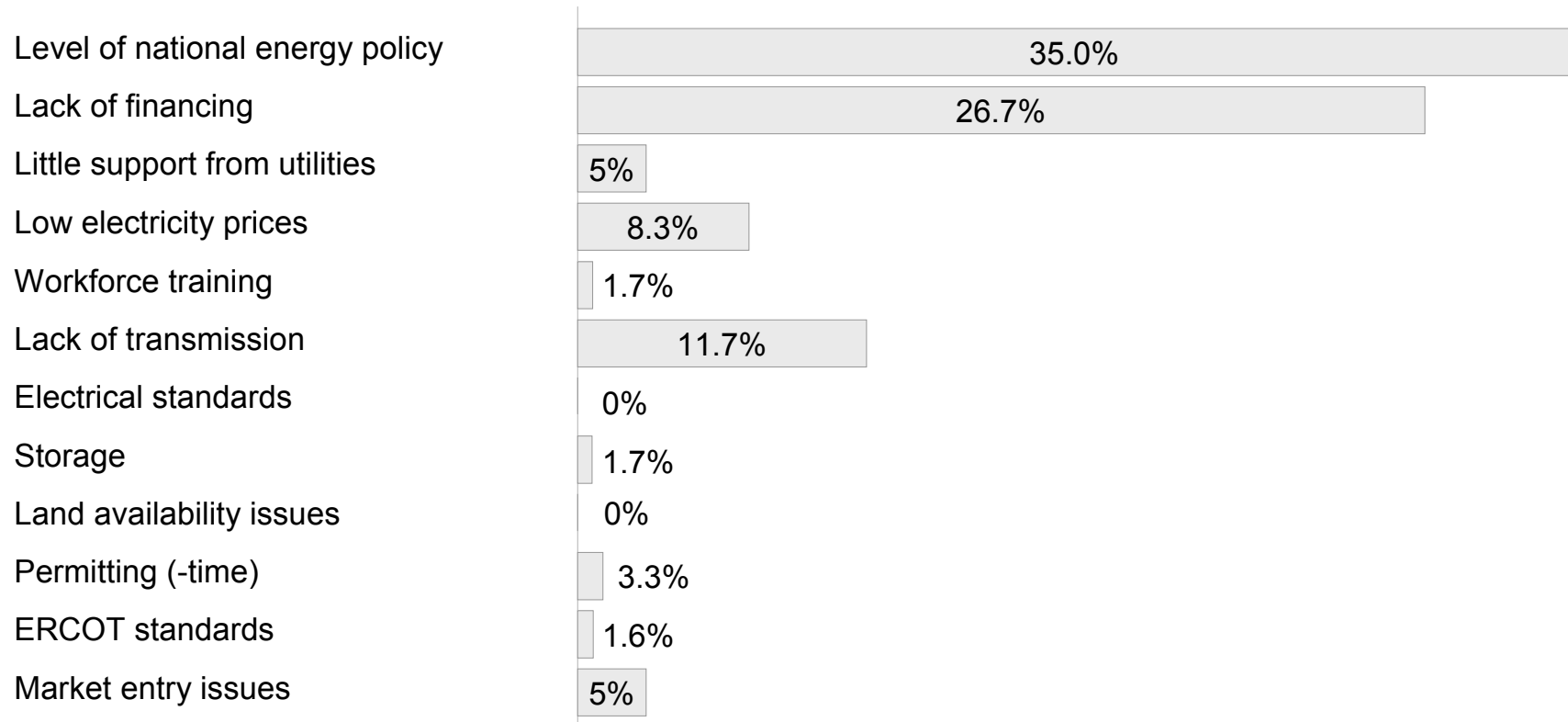
Lack of financing (72.0%) and a comprehensive national energy policy (67.0%) are major obstacles for individual businesses

Key: 1 = Not Important, 3 = Neutral, 5 = Very Important

# “Lack of national energy policy” is No. 1 obstacle for U.S. wind industry

## Overview

What do you regard as the number one obstacle for the U.S. wind industry?

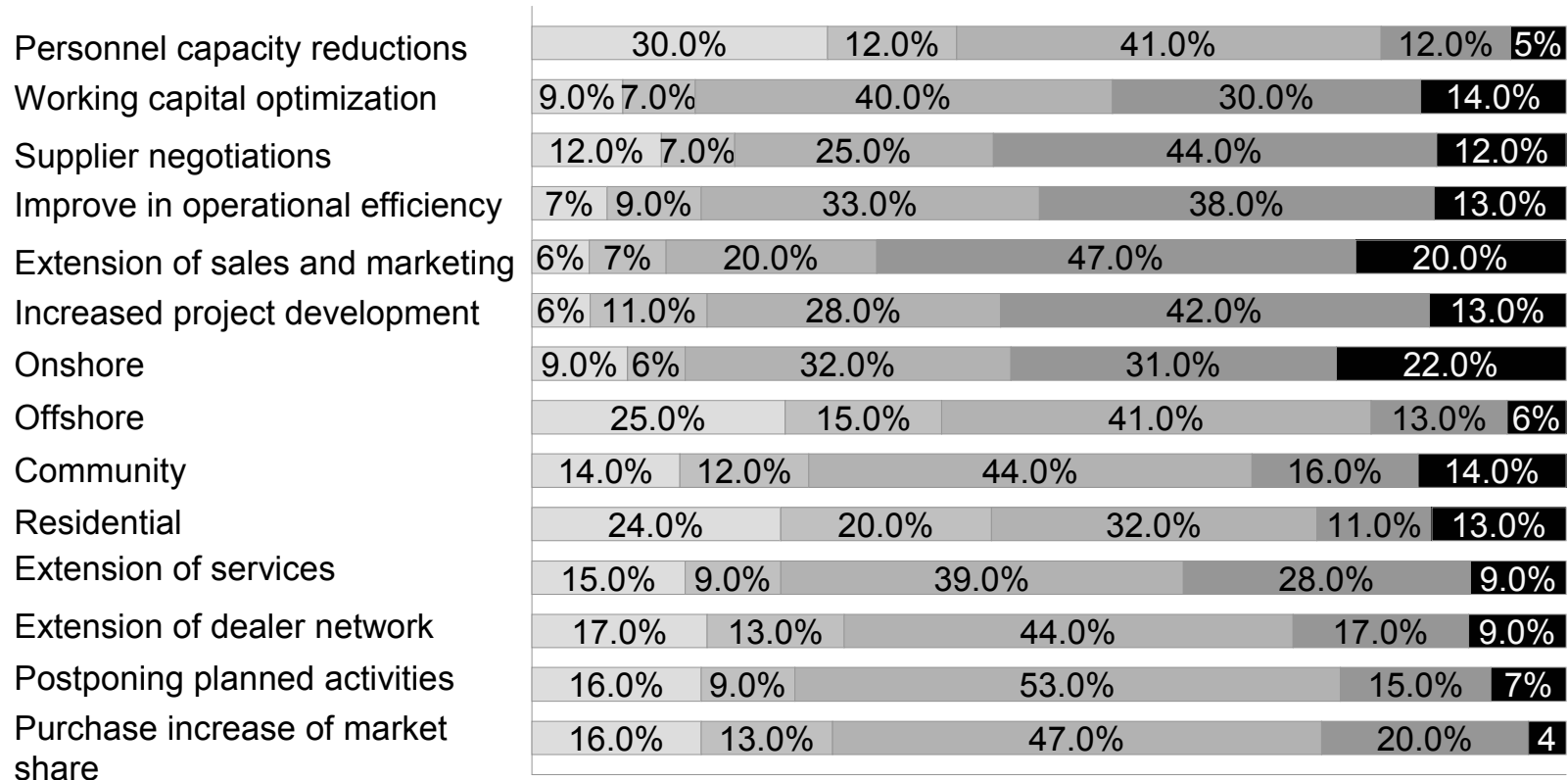


Level of national energy policy is seen as no. 1 obstacle (35.0%) for *wind industry*

# Market penetration and operational improvement are key strategic focus

Strategic activities in 2010

## What will be your strategic activities for the U.S. wind market in 2010?



Key<sup>1</sup>: 1 2 3 4 5

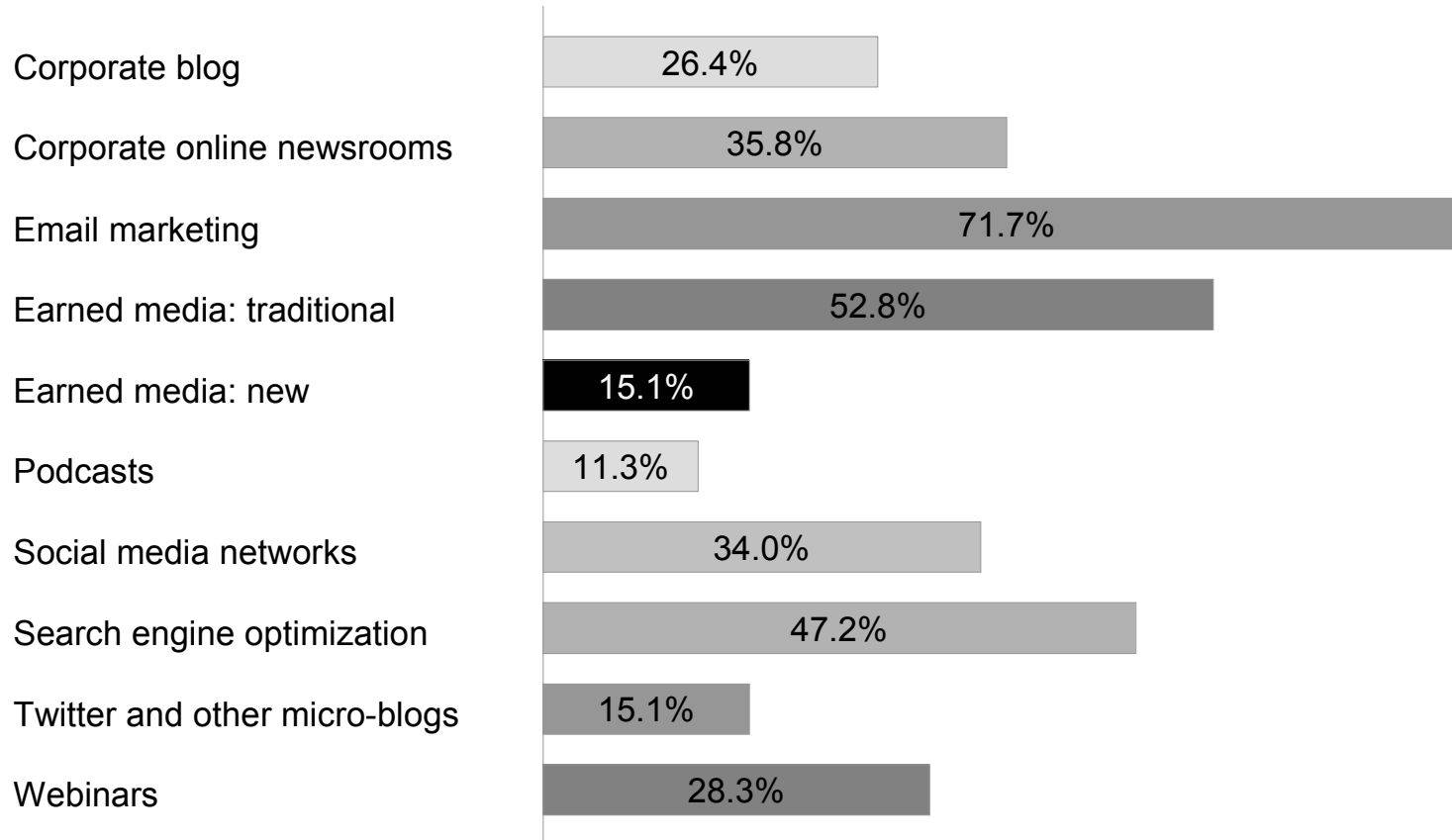
Strongest focus will be on sales and marketing (67.0%), supplier negotiations (56.0%) and project development (54.0%)

Key: 1 = Not Important, 3 = Neutral, 5 = Very Important

# Traditional tools currently most important in PR

Planned usage of communication tools in 2010

**Which of the following media tools and techniques will you be employing in your 2010 communications strategy for the U.S. market?**



Popularity of proven techniques such as email marketing and traditional PR

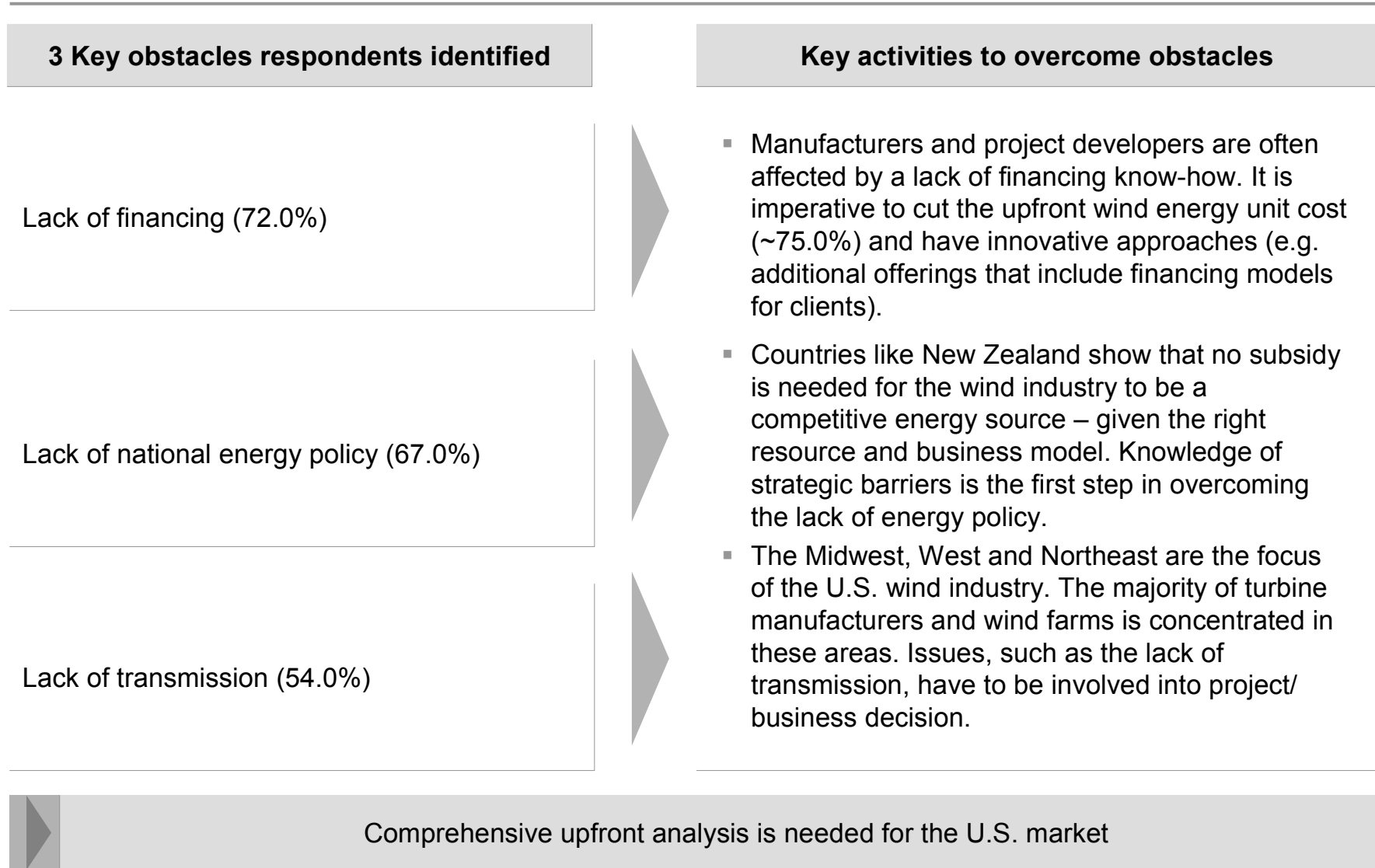
Multiple Answers Possible

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WindMonitor 2010  
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# Conclusion: strategic planning is needed to overcome obstacles

Major obstacles for wind industry



# Contact

For more information and interview requests

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## **About Gibbs & Soell, Inc.**

Founded in 1971, Gibbs & Soell is the eighth largest independent public relations agency in the United States (*O'Dwyer's 2010 PR Agency Report*). Headquartered in New York, Gibbs & Soell has full-service offices in Chicago, Raleigh, N.C. and Zurich, Switzerland, and a global footprint that extends to more than 30 countries through its affiliate network that includes the Public Relations Organisation International (PROI). For more information, please visit [www.gibbs-soell.com](http://www.gibbs-soell.com).

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## **About Droege & Comp., Inc.**

The Droege Group and its subsidiaries, which includes Droege & Comp., have been active in the international market for over 20 years. Droege & Comp. was founded in 1988 by Walter P. J. Droege to provide consulting services by entrepreneurs for entrepreneurs. Adherence to the principle of “The art of execution-driven consulting” has actually put Droege & Comp. at the forefront of implementation-oriented consultancies. For more information, please visit [www.droege-group.com](http://www.droege-group.com)