

BWEA



Delivering the UK's wind, wave and tidal energy



embrace the revolution

BWEA Annual SWT Market Report

Alex Murley

ALL ENERGY 2008

21 May 2008

BWEA:-

- represents the UK wind and marine industries to government, industry, the media, and the public
- was formed in 1978 and now has over 380 corporate members



- Leading voice for the UK **micro- and small-wind industry**

BWEA



SWT System Designs

Micro- 100 W – 1.5 kW

Small- 1.5 kW – 50 kW

Off grid – 12/24/48 Volts

On grid – 240 Volts

Building mounted or
Free standing

Horizontal axis or
Vertical axis



BWEA Annual SWT Market Report Background:

- No data
- Changing market dynamic
- Energy policy
- Report participation –
Manufacturers
Installers
- Numbers, system type, revenue,
import and export



Major themes:

- High levels of UK market growth;
- Indigenous manufacturing base currently holds large share of UK market;
- UK manufactures export market is growing strongly;
- Remains an emerging industry in need of support.



BWEA Annual SWT Market Report	UK 05	TOTAL 05	UK 06	TOTAL 06	UK 07	TOTAL 07	UK 08	TOTAL 08	UK 09	TOTAL 09
Product										
0-1.5 kW	862	2382	1634	3698	2750	5005	6750	10051	11712	16006
1.5-10 kW	155	193	271	332	677	722	911	1307	1503	2590
10-20 kW	13	17	13	14	18	28	154	564	340	795
20-50 kW	3	3	1	1	14	14	29	32	56	66
Total	1033	2595	1919	4045	3459	5769	7844	11954	13611	19457

~6500

- number of micro- and small-wind turbines deployed within UK since 2005 (2005-2007)

~3500

- number of micro- and small-wind turbines deployed within UK in 2007 alone.

BWEA Annual SWT Market Report	UK 05	TOTAL 05	UK 06	TOTAL 06	UK 07	TOTAL 07	UK 08	TOTAL 08	UK 09	TOTAL 09
Product										
0-1.5 kW	862	2382	1634	3698	2750	5005	6750	10051	11712	16006
1.5-10 kW	155	193	271	332	677	722	911	1307	1503	2590
10-20 kW	13	17	13	14	18	28	154	564	340	795
20-50 kW	3	3	1	1	14	14	29	32	56	66
Total	1033	2595	1919	4045	3459	5769	7844	11954	13611	19457

80%

- UK market growth (2006 to 2007)

120%

- UK market growth forecast (2007 to 2008)

BWEA Annual SWT Market Report	UK 05	TOTAL 05	UK 06	TOTAL 06	UK 07	TOTAL 07	UK 08	TOTAL 08	UK 09	TOTAL 09
Product										
0-1.5 kW	862	2382	1634	3698	2750	5005	6750	10051	11712	16006
1.5-10 kW	155	193	271	332	677	722	911	1307	1503	2590
10-20 kW	13	17	13	14	18	28	154	564	340	795
20-50 kW	3	3	1	1	14	14	29	32	56	66
Total	1033	2595	1919	4045	3459	5769	7844	11954	13611	19457

40%

- Proportion of total product that was exported by UK Manufacturers (2007)

Export as a share of total production is likely to remain high over the next two years

BWEA Annual SWT Market Report	UK 05	TOTAL 05	UK 06	TOTAL 06	UK 07	TOTAL 07	UK 08	TOTAL 08	UK 09	TOTAL 09
Ongrid	165	205	535	621	1623	127	5444	6679	10435	12537
Offgrid	868	2390	1382	3424	1836	4042	2400	5275	3177	6990
Buildings mounted	2	2	212	216	881	901	4316	4672	8643	9177
Free standing	1031	2593	1696	3815	2578	4868	3528	7287	4968	10300

50:50

- Ongrid/Offgrid market share (2007)

Ongrid market share expected to increase strongly over the next two years.

25:75

- Building mounted/Free standing market share (2007)

Building mounted market share expected to increase strongly over the next two years.



Policies to 2020:

EU 2020 Renewable Energy Binding Targets

EU – 20 % (Electricity, Heat, Transport)

UK – 15 %

RAB Report on 2020:

1.17 million micro- and small-wind units

15% rural housing stock

2% urban and suburban housing stock

Is this possible?

Policies to 2020:

- LCBP - not working
 - Caps
- CERT - very unlikely to support uptake in Microgeneration
 - Equivalent for Microgeneration?
- Planning remains problematic for all
 - GPDO
 - Guidance
- Fiscal and financial support
 - Feed-In-Tariffs style mechanism for microgeneration
 - BUT with upper limit!



Alex Murley

Small-Systems Manager

0207 2888 372

alex@bwea.com

www.bwea.com