

The UK small wind system market On the edge of change ?

27 April 2010

International Small Wind Conference

Alex Murley, Head of Small-Systems, RenewableUK

RenewableUK

- Established in 1978
- 600 corporate members
- Wind and Marine energy



- Voice of the UK small scale wind sector

Small wind system designs + setup

- Micro - 0 – 1.5 kW
- Small - 1.5 – 15 kW
- Small-medium - 15 – 100 kW

Freestanding / Building mounted
Horizontal axis / Vertical axis

Off grid / On grid
Heat applications



Small wind system UK market report 2010

Launched at ISWC2010

Introduce technology

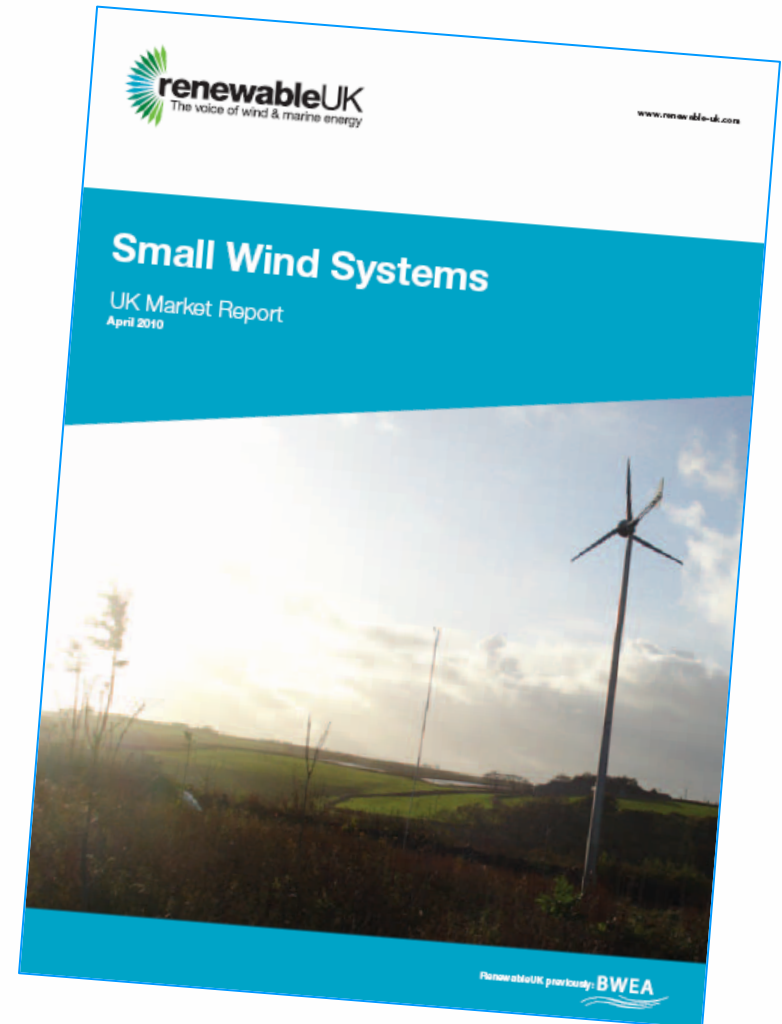
Aid industrial awareness

Support policy development

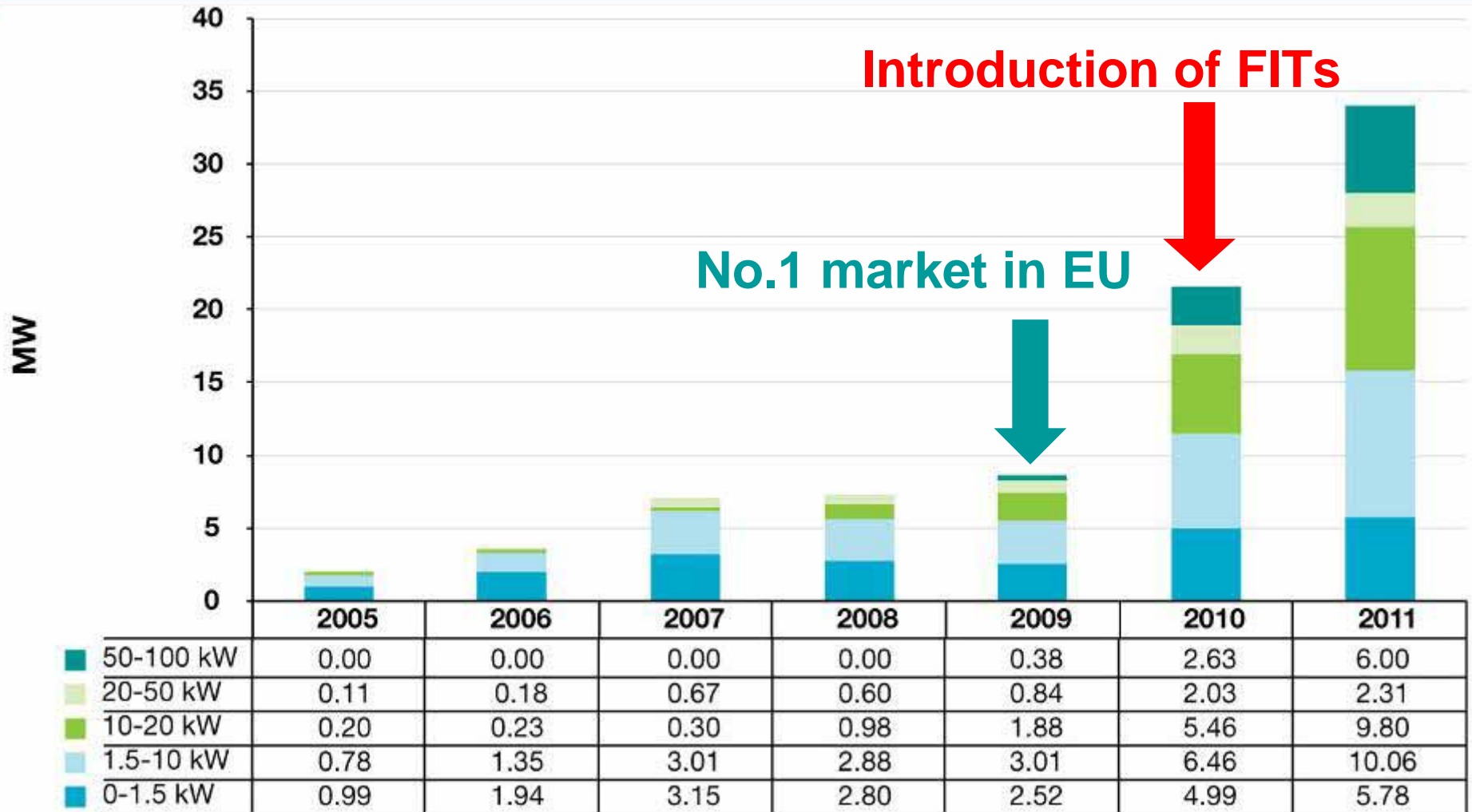
Historic data – 2005-2009

Market forecast – 2010-2011

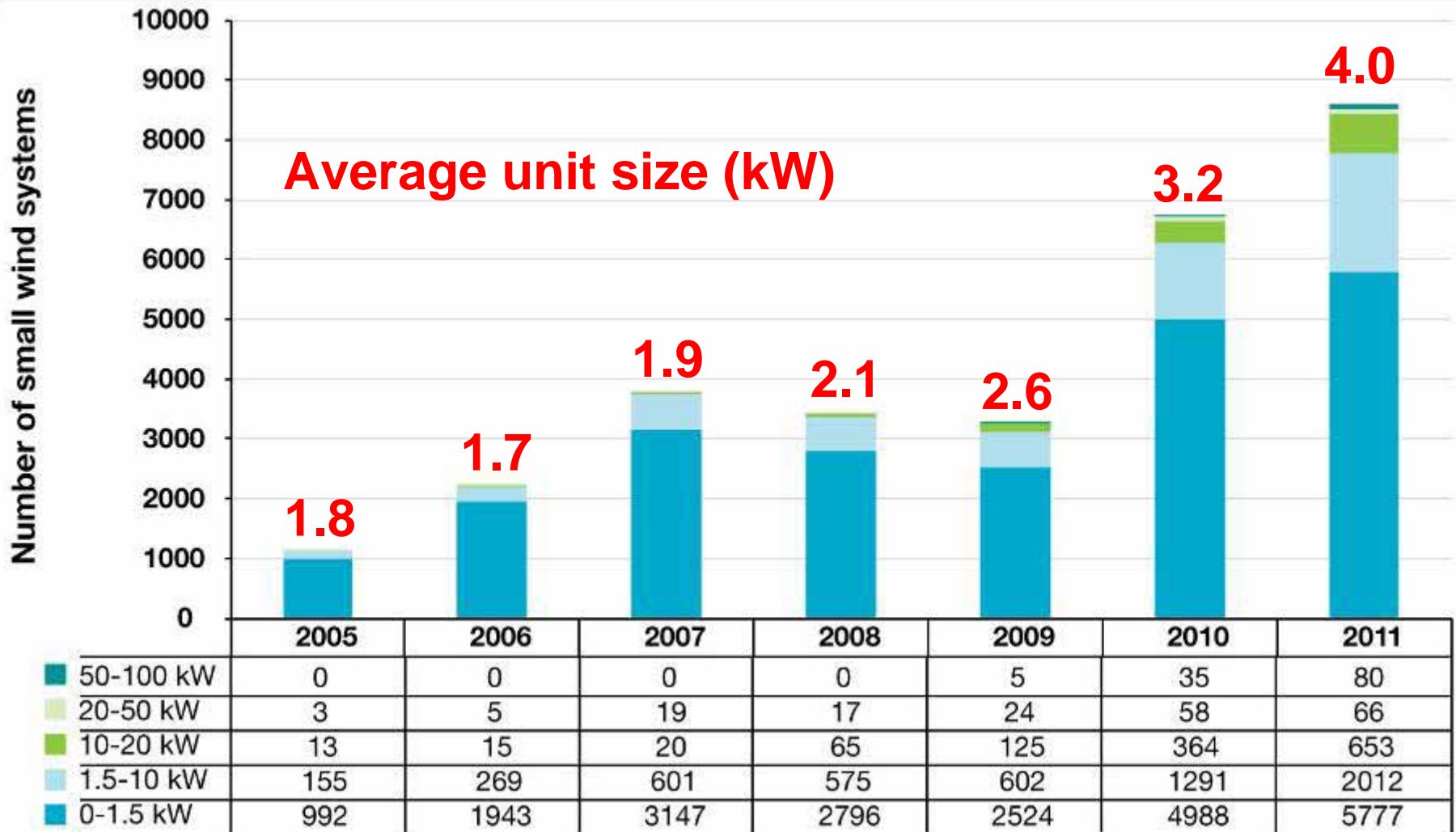
Assesses the size + dynamic of
UK market for small wind systems



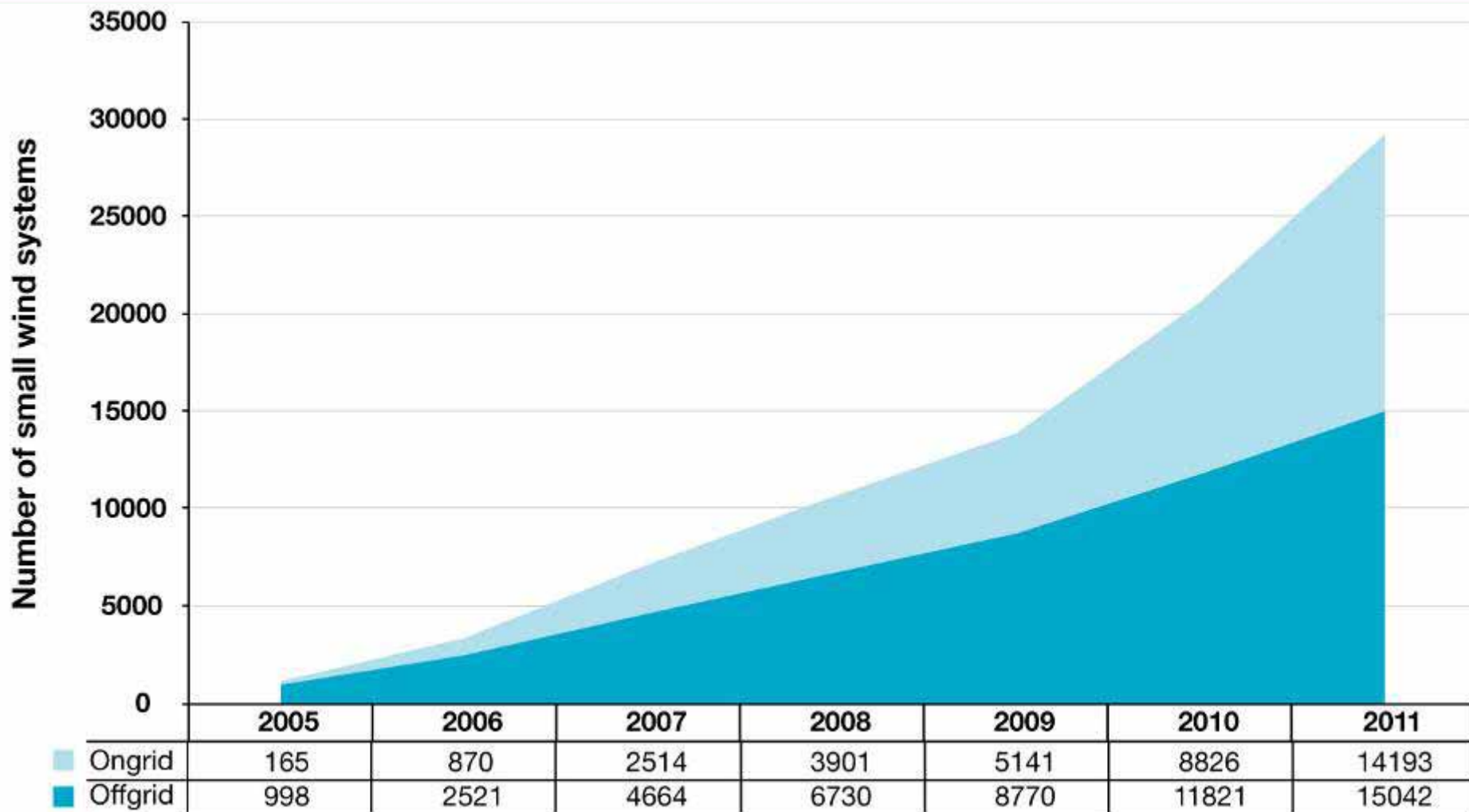
UK annual deployment 2009 – 8.62 MW (+19% on 2008)



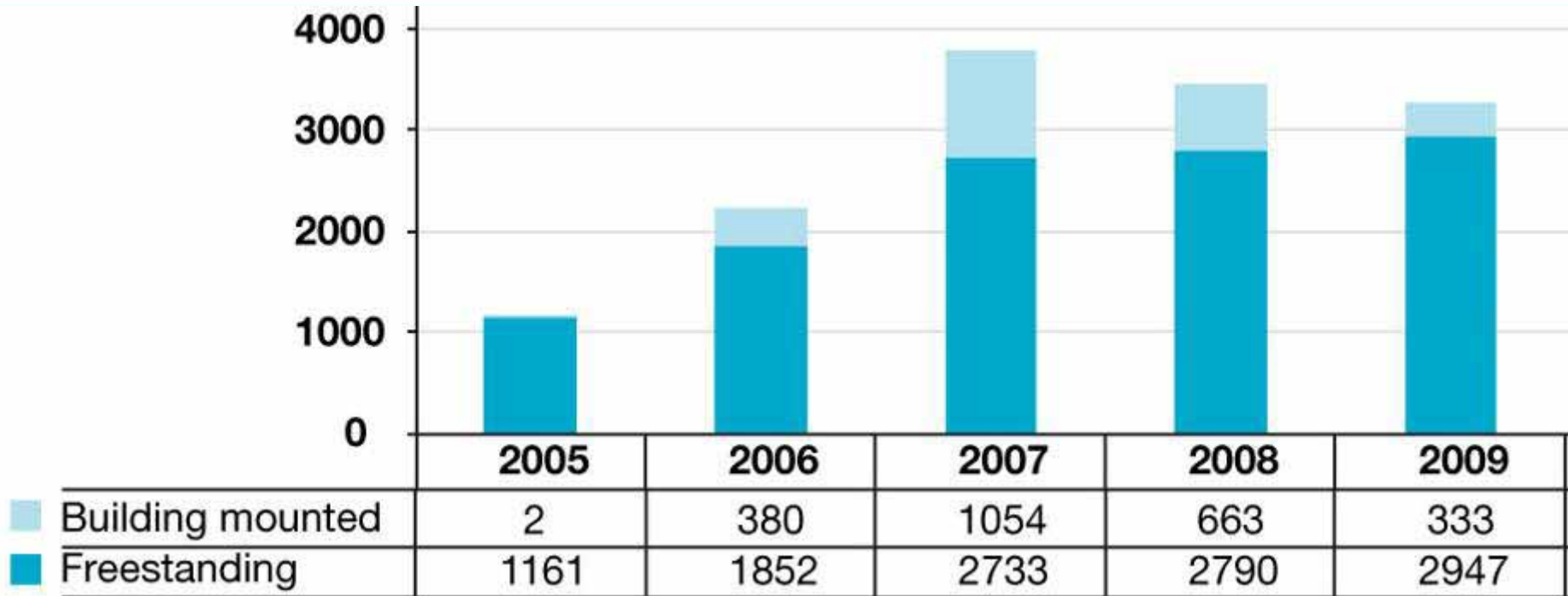
UK annual deployment 2009 – 3,280 systems installed (-5% on 2008)



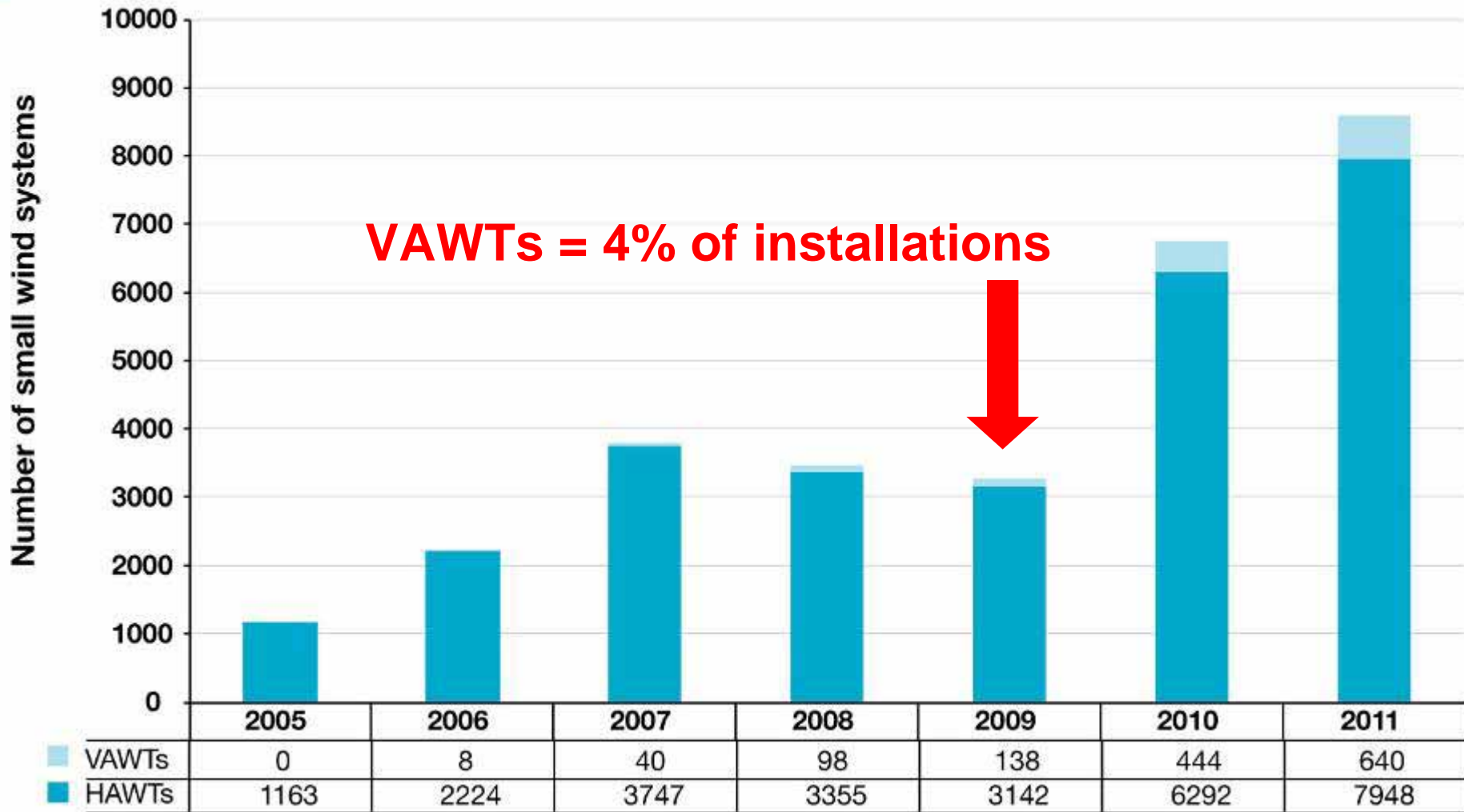
UK cumulative deployment Ongrid – the growth market



UK annual deployment Building mounted (10% of 2009 installations)



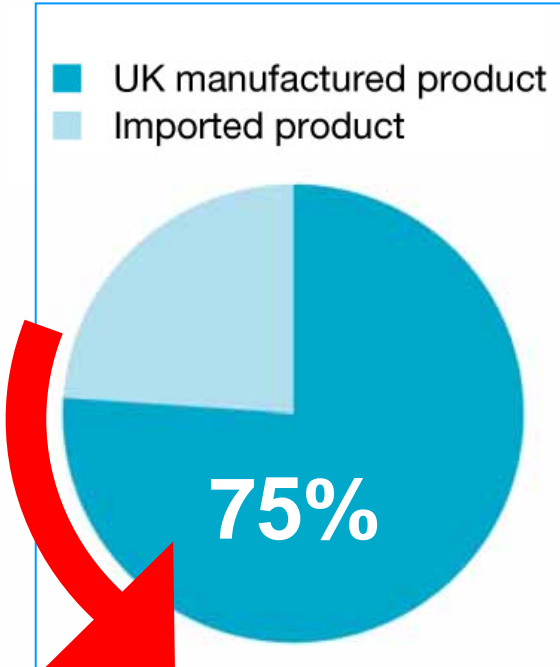
UK annual deployment HAWTs + VAWTs



UK market revenues 2009

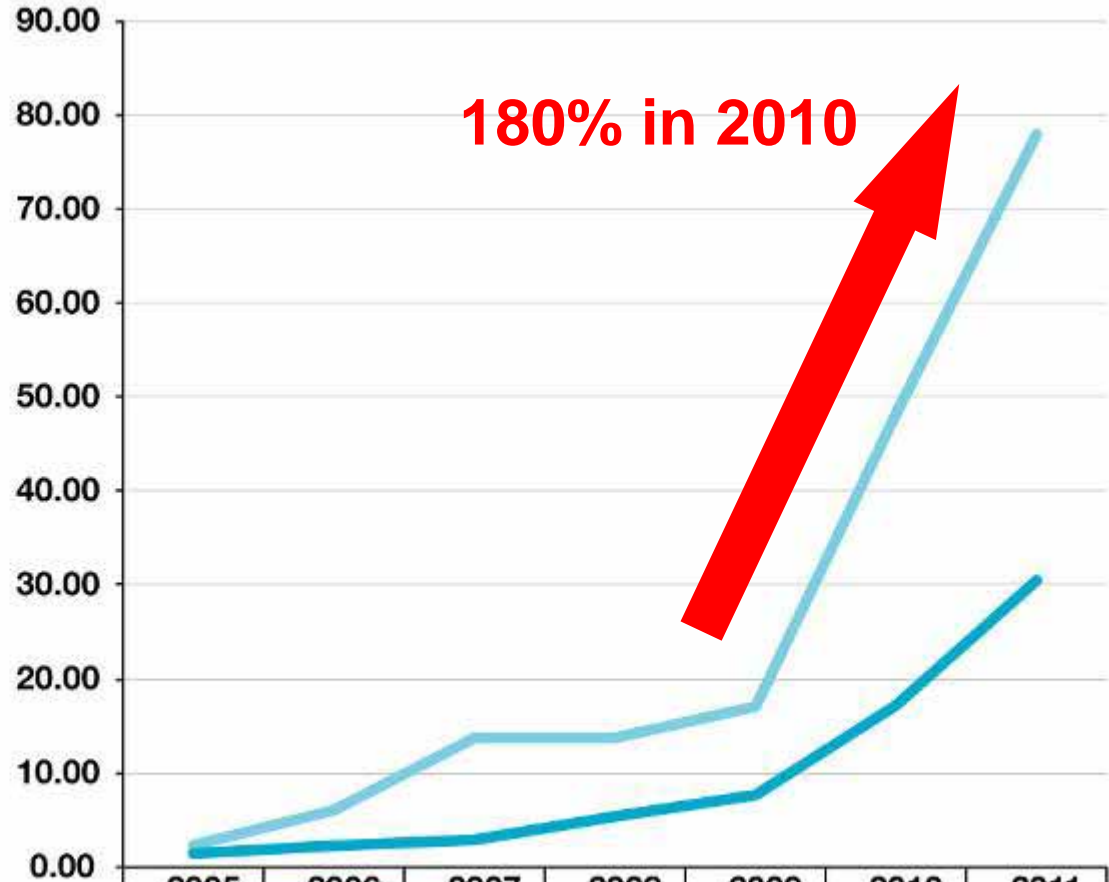
£17.1 million = +24.5% on 2008

■ UK manufactured product
■ Imported product



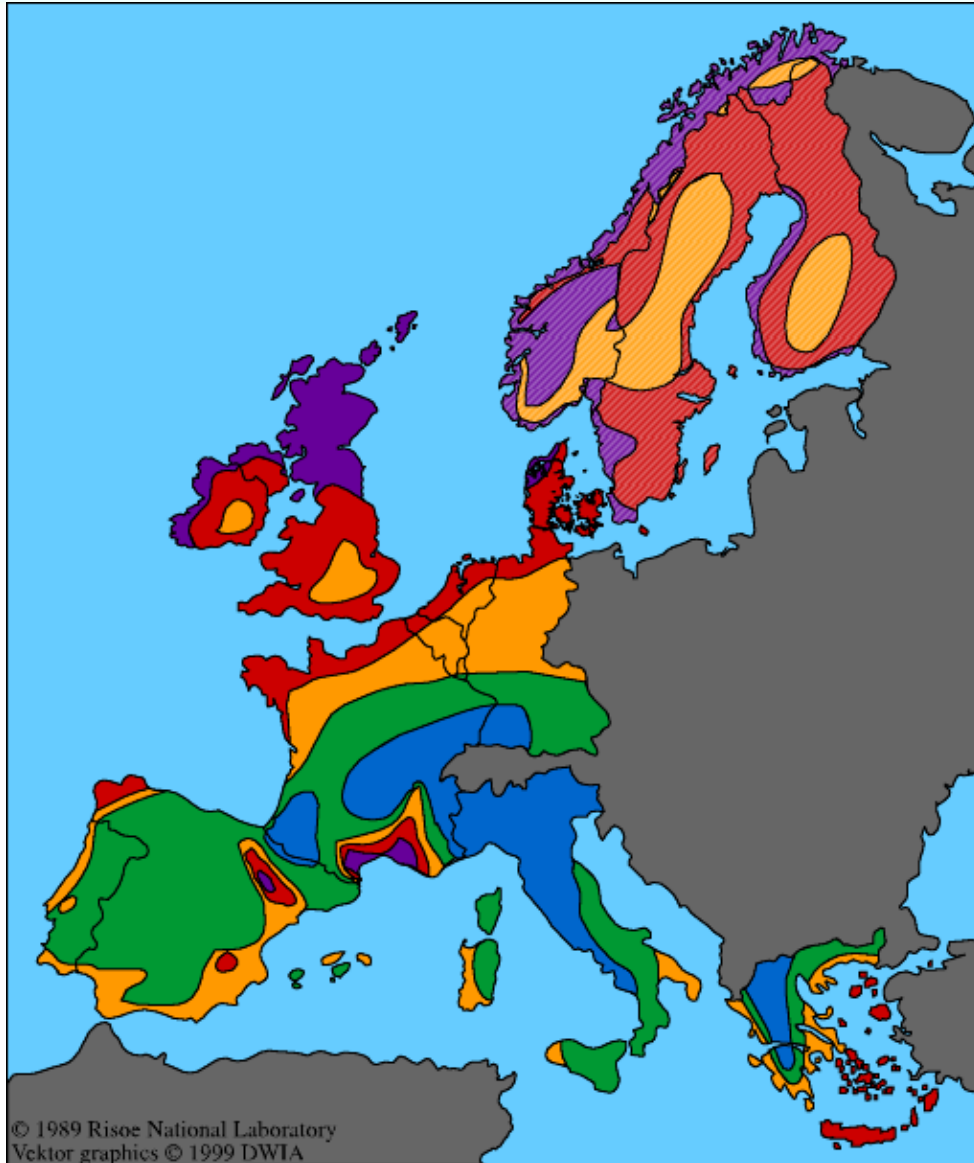
**Will FITs
increase competition?**

Market size (£ million)



	2005	2006	2007	2008	2009	2010	2011
— Gross UK market revenue	2.36	6.07	13.70	13.75	17.12	48.09	77.99
— Gross export market revenue	1.48	2.21	2.71	5.22	7.59	17.09	30.53

Why is the UK a leading market?



- Best resource in EU
- Aware consumers
- High electricity price
- Affluent consumers
- Existing industry
- Financial incentives

Benefits:

- Environment
- Economic
- Employment

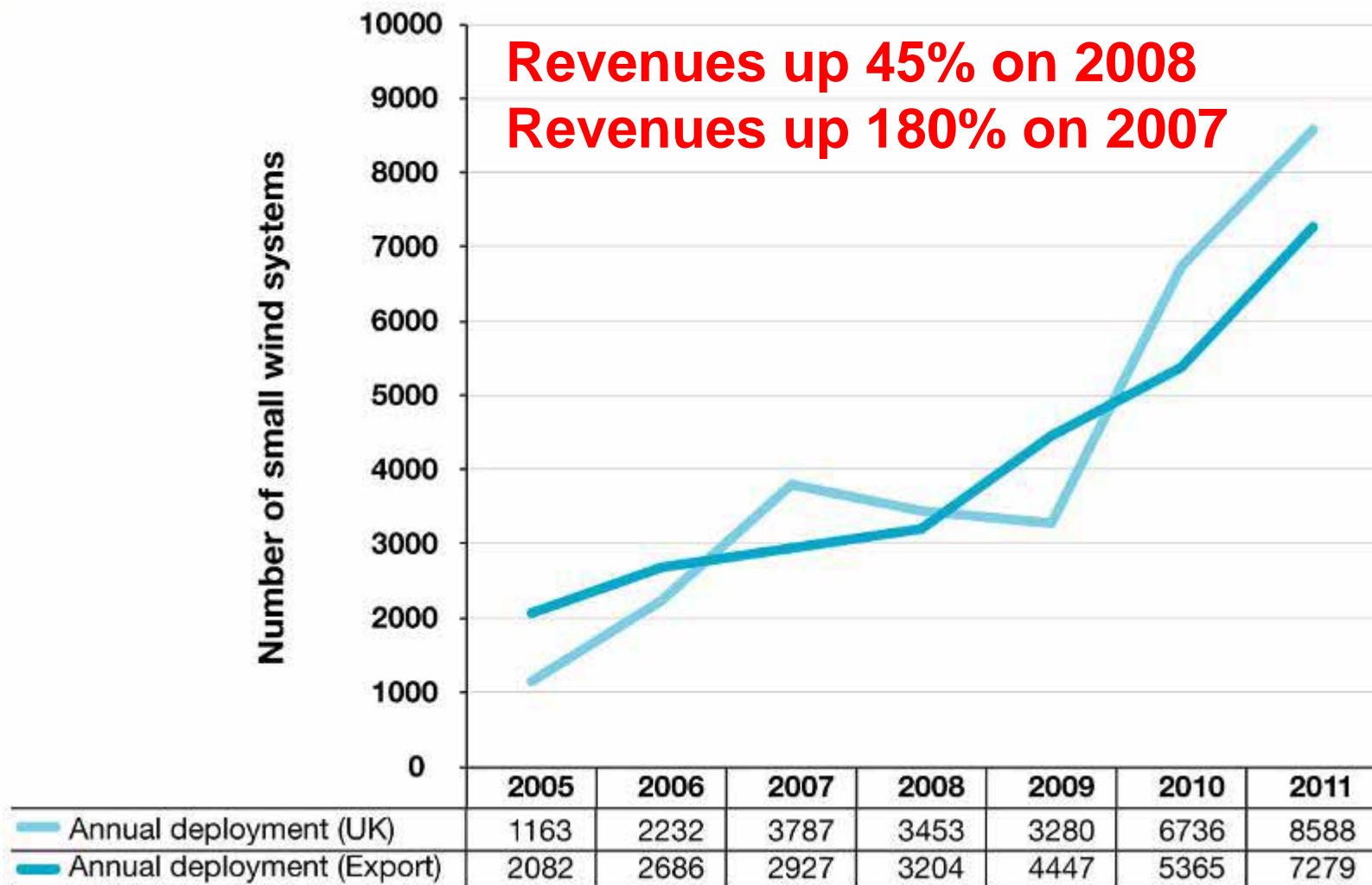
UK micro- and small-wind industry



- Long history - 30+ years
- Over 20 micro- and small-wind manufacturers
- Export ~60% of output to over 100 countries
- Employ 1,755 UK jobs

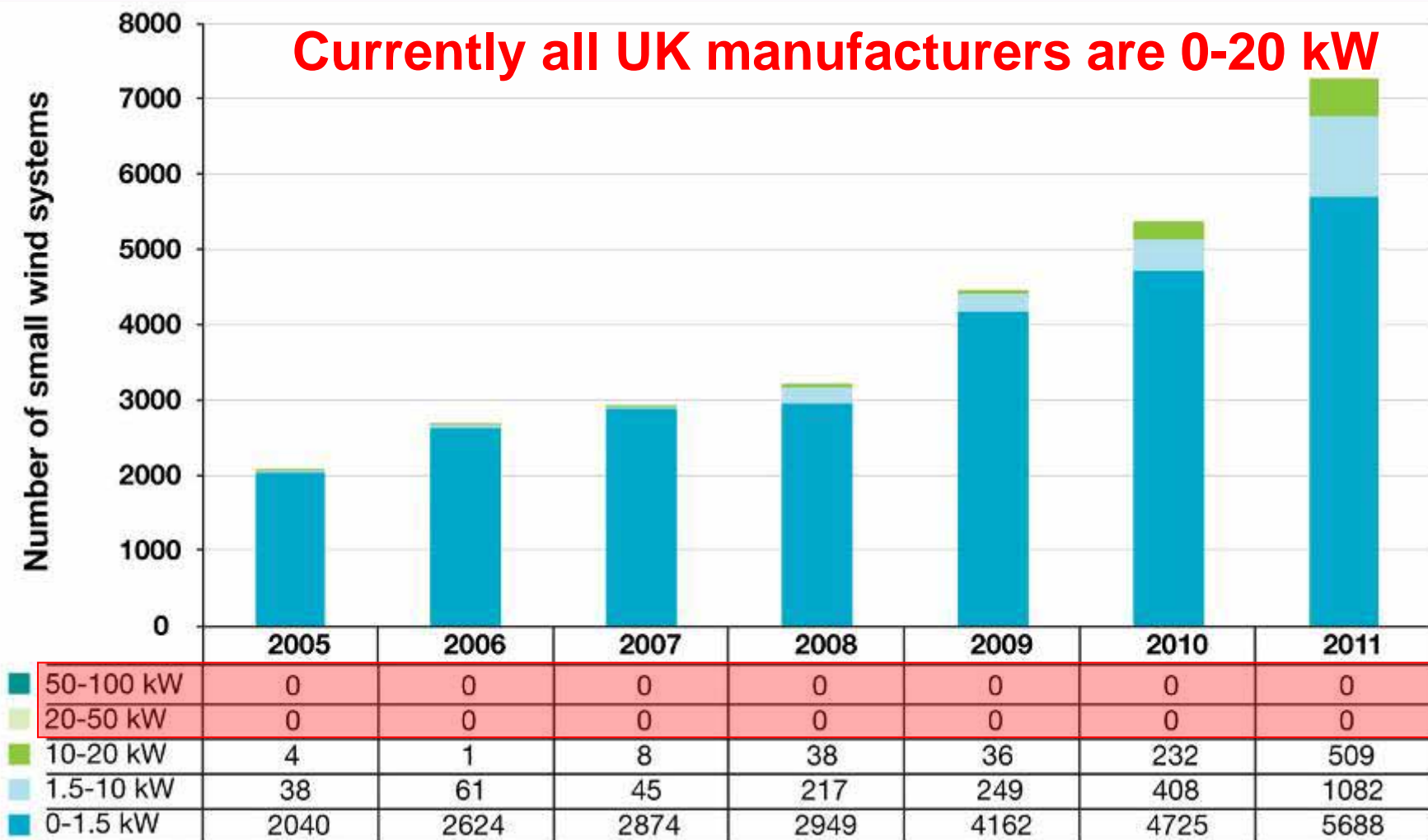
UK exports in 2009

4,447 systems (+39% on 2008)



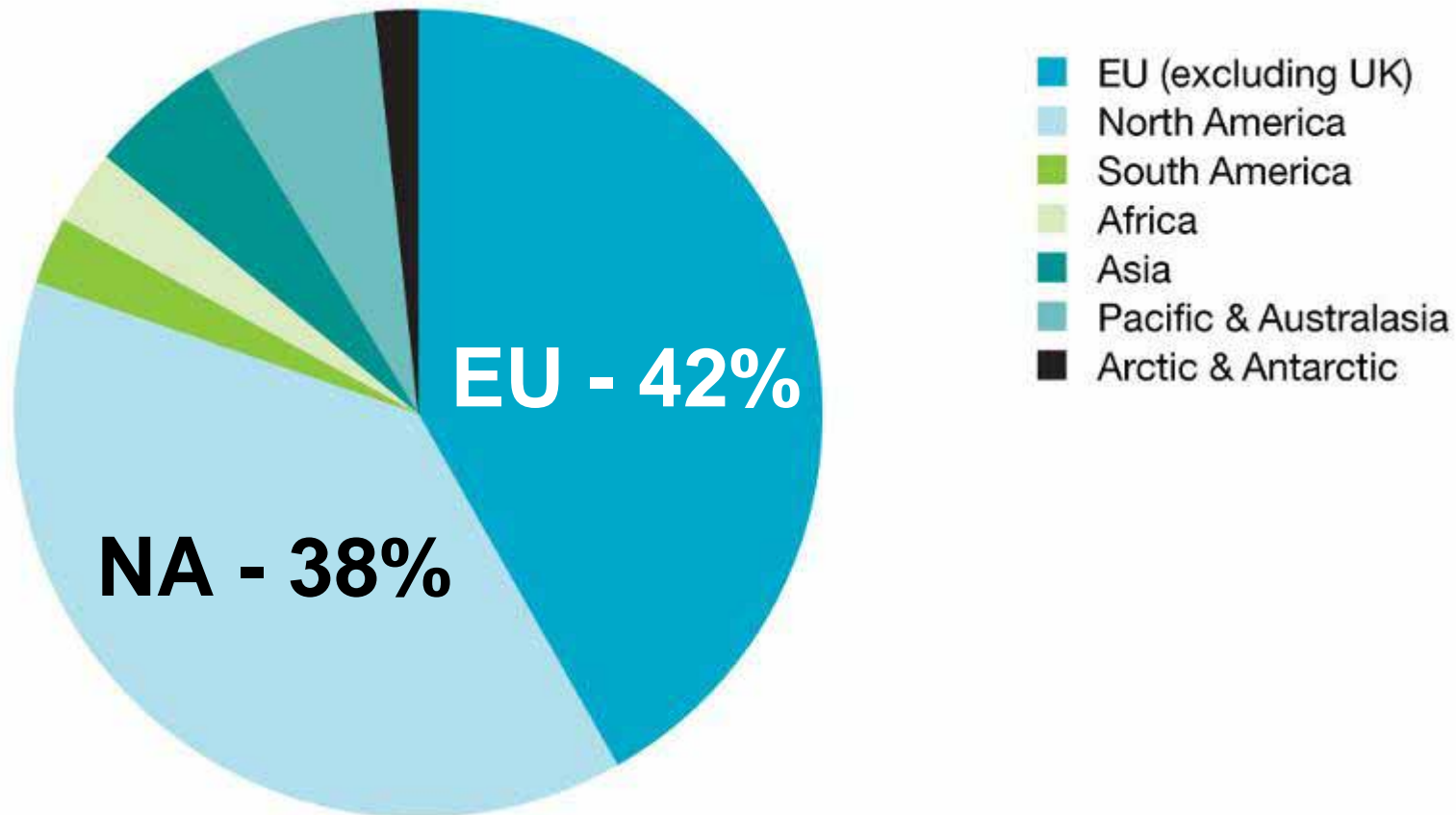
UK annual exports

Currently all UK manufacturers are 0-20 kW



UK export markets 2009

£7.6 million = +45% on 2008



Key industrial challenges for 2010

- (1) Planning
- (2) Customer interface
- (3) Industry standards



(1) Planning

- Clear technology specific guidance
- General Permitted Development Orders
- Increased funding for Local Authority training



(2) Customer interfaces

- Customer awareness
- Industry wide marketing
- Resource estimation



(3) Industry standards

- Uphold customer confidence
- Protect industrial reputation
- Sustainable market growth

APPROVED PRODUCT



Contact details

Alex Murley

Head of Small-Systems

0207 9013 022

a.murley@renewable-uk.com

www.renewable-uk.com