

Wind Power Generation System Market in Japan: Key Research Findings 2011

◆ Research Outline

Yano Research Institute has conducted a study on the market of wind power generation systems with the following conditions:

1. Research period: From July to September, 2011
2. Research target: Large manufacturers of windmills, import agent companies, power generation companies, manufacturers of wind power generation system equipments, and etc.
3. Research methodologies: Face-to-face interviews, survey via telephone/email by the specialized researchers and literature research

Targets of the research on domestic wind power generation systems and electricity-selling market using wind power generation systems

This research targets only those newly equipped systems for domestic wind power generation and electricity selling. Therefore, demands for repairing and replacement of existing equipments are not included. In addition, the forecast in this research is based on a growth scenario of offshore wind power generation systems.

◆ Key Findings

- **Domestic market of wind power generation systems remained moderate at 73.8 billion yen, whereas electricity-selling through wind power generation systems market showed steady growth at 41.4 billion yen**

The estimated market size of the newly equipped wind power generation systems (only those that newly started the operation) for FY 2010 was 73.8 billion yen, up by 1.2 % from the previous year. Unlike the fast-growing global market the domestic wind power generation market shows only a moderate growth. One of the main reasons is a discontinued subsidy plan which is to be replaced by the feed-in tariff for renewable energies.

On the other hand, the sales of electric power using the wind power is showing a solid growth at 41.4 billion yen in FY 2010, up by 9.8 % of the previous year, due to increase of accumulative adoption of wind power generation systems.

- **Forecast of market size of domestic wind power generation systems is estimated as 129 billion yen in FY2015, 388 billion yen in FY2020, where as electric power sales market is estimate as 138billion yen in FY2015 and 414 billion yen in FY2020**

The following three conditions are predicted to boost the market of domestic wind power generation systems to a steady and healthy growth beyond 2012: 1) Shift to relevant feed-in tariff system, 2) easing or abolishing of necessary regulations relating to the electric power systems, and 3) normalization of market functions by loosening various regulations.

The estimated market size of the wind power generation systems based on a growth scenario of offshore wind power generation system (relatively high estimation) is 129 billion yen in FY2015, 388 billion yen in FY2020, whereas the market of electric power sales using the wind power is estimated as 138 billion yen in FY2015 and 414 billion yen in FY2020.

◆ **Report format**

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■ **Figure 1: Transition and Forecast on Market Size of Domestic Wind Power Generation Systems**

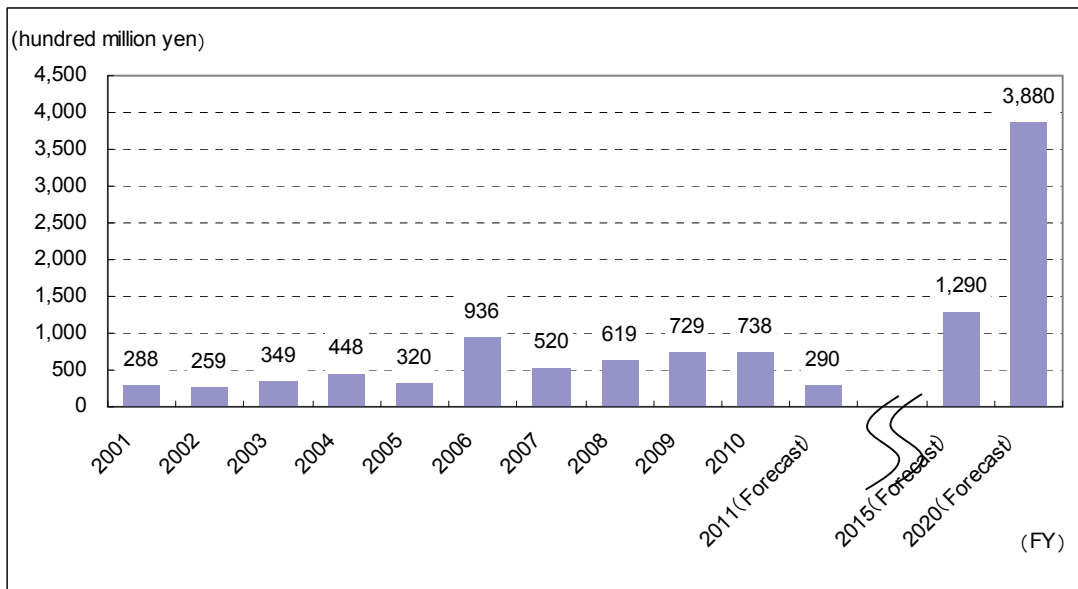


Figure 2: Transition and Forecast on Market Size of Domestic Electricity-Selling Using Wind Power

