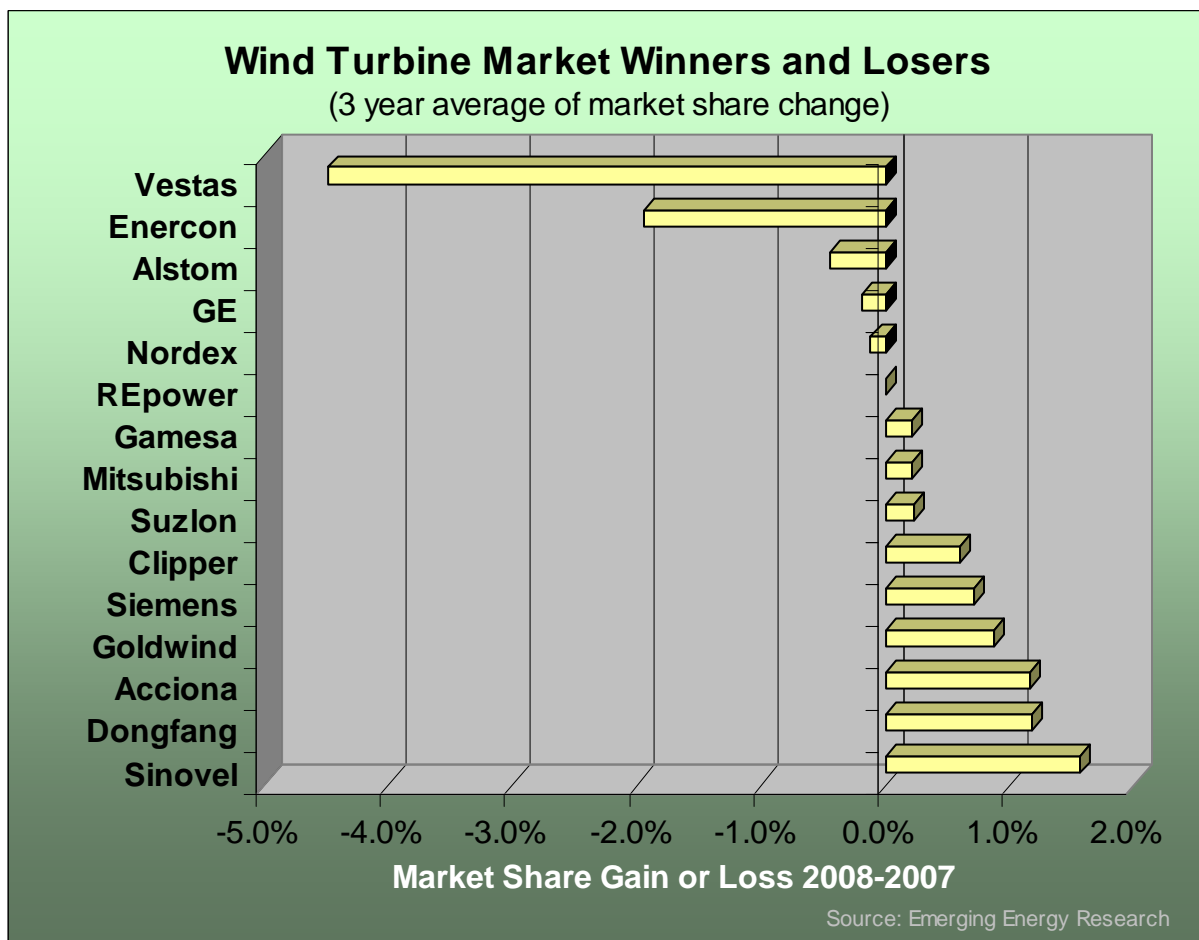


Winds of Change:

China makes huge gains as Vestas hemorrhages market share and the United States falls behind.

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There are strategic changes afoot in the wind turbine market. Analyzing of the data from Emerging Energy Research, Vestas' is hemorrhaging market share like a hemophiliac in a razor blade factory. They've gone from a dominant 42% share in 2001 to a moderately respectable 19%. But it's losing share at an average 5% per year. They are still number one in the market, but they won't be at this pace. They must do something soon. GE is close to passing Vestas, but its share gains have not been consistent.



More stunning is the rapid success of China's emerging supplier base, which gained a combined average of 3.6%. This compares with -2.4% for the EU and -2.1% for the U.S. Moreover, the gains are consistent with the top three Chinese wind turbine competitors in the top 4 market share gainer slots. Goldwind was edged out the top spot by Spain's Acciona. Siemens closed out the top 5 spots. Clearly, the situation for the EU's suppliers is not dire. Their competitors are doing a great job of mixing it up. Acciona is a cost leader and Siemens is a technology leader. As for those in the United States, they have systematically lost share.

These markets are very regional, which helps explain both China's and the EU's results. As for the United States, it's questionable that it can play globally without a national game plan. You need a strong market at home to play globally. The U.S. will continue falling behind in Green Tech as long as the political blunderbuss green washes the landscape. Green Tech is as much today's technology battle front as high tech was back in the sixties.



– G Dan Hutcheson

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Positioning is about appearing to be larger than life.

Peacock, *Pavo cristatus*, The national bird of India, Philadelphia Zoo Reference number: 126-2618 03

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