

American Wind Energy Association

U.S. Wind Industry Second Quarter 2015 Market Report

A product of AWEA Data Services

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The American wind energy industry installed 1,661 megawatts (MW) in the second quarter of 2015, a record for second quarter installations. The 1,994 MW installed in the first two quarters of 2015 is more than double the capacity installed in the first half of 2014. The U.S. now has an installed wind capacity of 67,870 MW and over 49,000 wind turbines.

There are over 13,600 MW of wind currently under construction, continuing near-record levels of construction activity. Over 800 MW of new power purchase agreements (PPA) were also signed in the second quarter of 2015.



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Key Takeaways

2015 Wind Project Installations

- During the second quarter of 2015, the U.S. wind industry installed 845 turbines totaling 1,661 MW, a record for wind installations in the second quarter. These turbines were installed across 12 projects in five different states. The most capacity was installed in Texas (1,226 MW), followed by Oklahoma (150 MW), California (107 MW), Illinois (99 MW) and South Dakota (80 MW).
- For the year, the U.S. wind industry has installed 1,014 turbines, totaling 1,994 megawatts (MW). This total is more than double the 835 MW installed during the first half of 2014 but still falls short of historical installation trends.
- There are now 67,870 MW of installed wind capacity in the United States and over 49,000 wind turbines. Texas now has over 15,000 MW of installed capacity and California has over 6,000 MW.

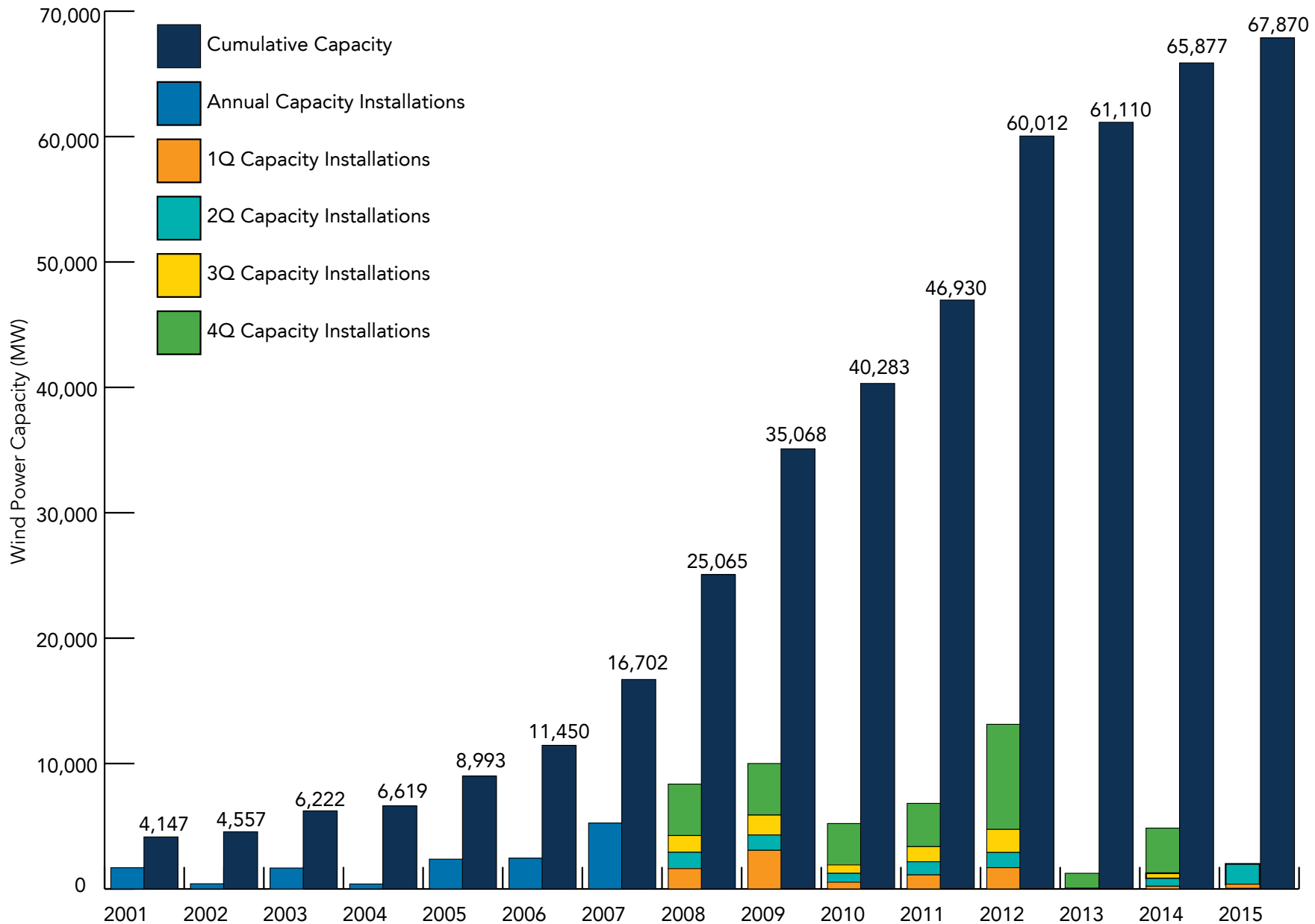
Wind Power Construction Activity

- Wind developers reported more than 2,200 MW of new construction activity in the second quarter of 2015. In total, there is currently more than 13,600 MW of wind capacity under construction across 101 projects in 24 states. These results continue the trend of near-record construction activity.
- Approximately 50% of all wind construction activity is currently focused in Texas (6,800 MW). There are over 1,400 MW under construction in Oklahoma, over 1,000 MW under construction in Kansas, nearly 680 MW under construction in Iowa, and over 530 MW under construction in North Dakota.

Wind Power Purchase Agreements, Southeastern Investments and Corporate Purchasers

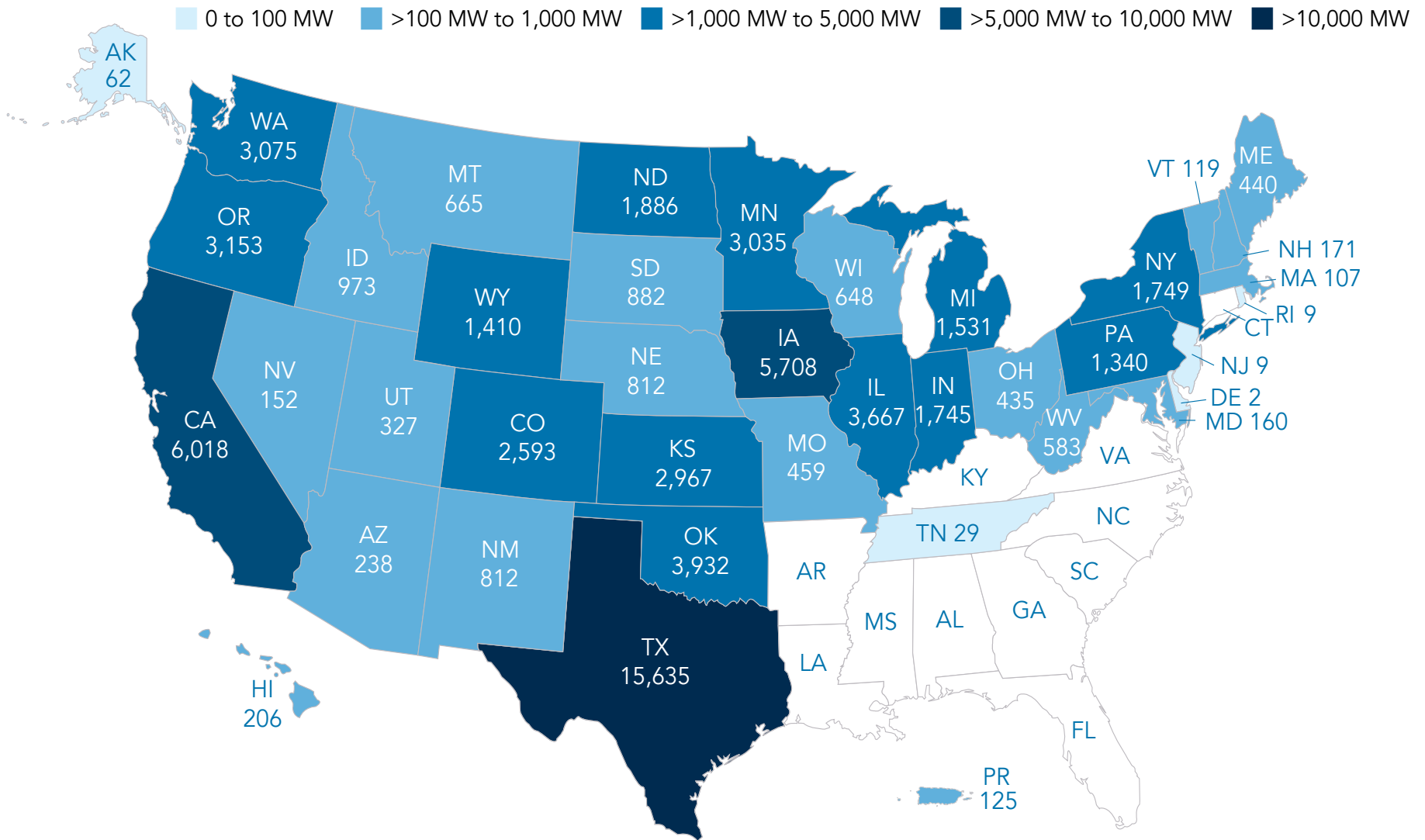
- Utilities and rural electric cooperatives signed over 800 MW of power purchase agreements (PPAs) for wind power in the second quarter of 2015, bringing total PPA contracts signed since the beginning of 2013 to more than 12,000 MW.
- Among the 12,000 MW of PPAs announced since the beginning of 2013, approximately 3,000 MW are currently online and 4,400 MW have not yet started physical construction.
- Southeastern utilities continue to invest in wind energy. Gulf Power and the Arkansas Electric Cooperative Corp. both signed PPAs in the second quarter of 2015 for 180 MW and 108 MW, respectively, to import wind energy into their states. The 180 MW Gulf Power contract marks the first approved wind PPA for the state of Florida.
- The second quarter of 2015 saw the commissioning of two utility-scale wind projects with corporate purchaser investment. Both the 98 MW Hoopston wind farm in Illinois owned by IKEA and the 211 MW Mesquite Creek wind farm in Texas invested in by Mars, Inc. are now online.

U.S. Annual and Cumulative Wind Power Capacity Growth

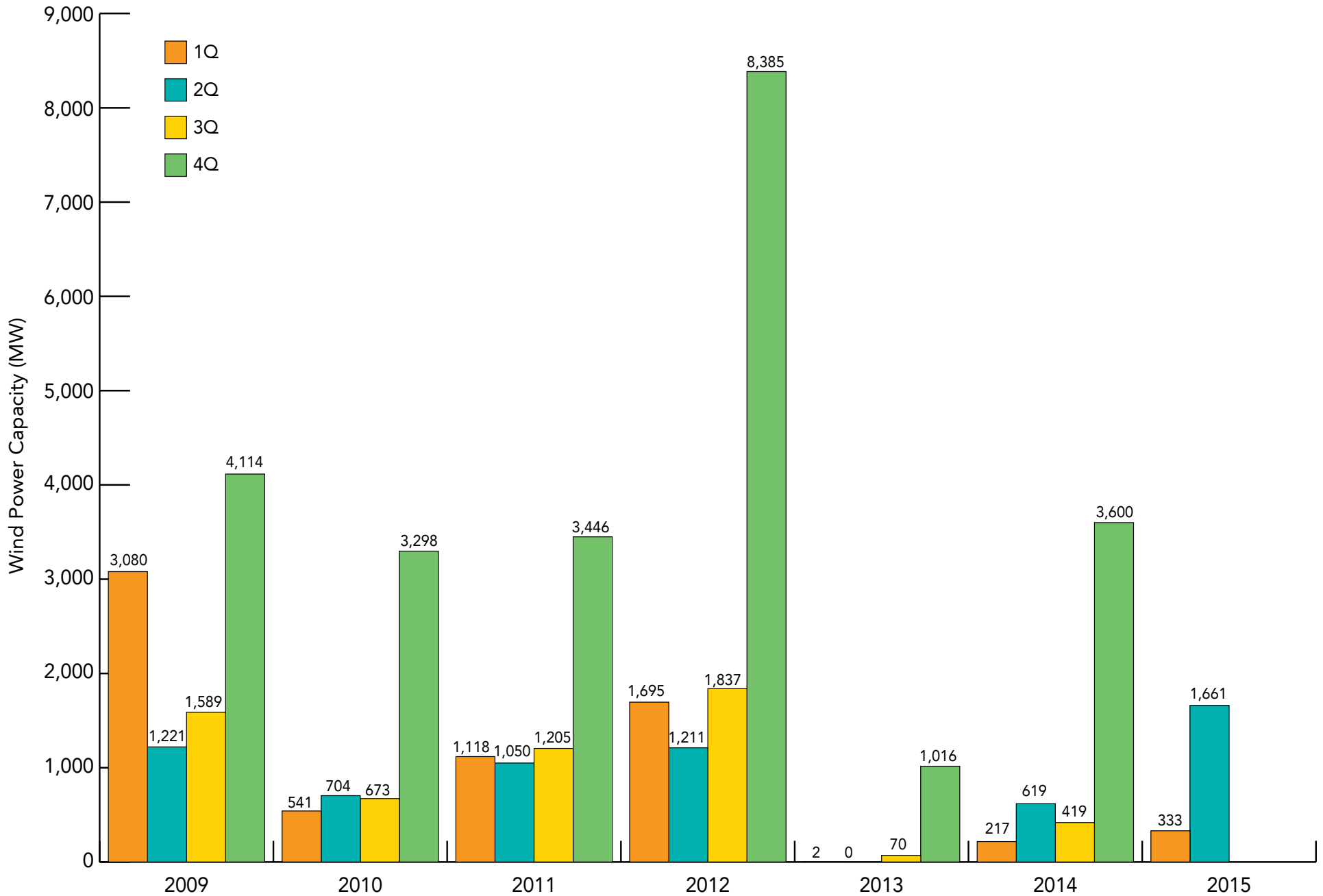


Note: Utility-scale wind capacity includes installations of wind turbines larger than 100-kW for the purpose of the AWEA U.S. Wind Industry Quarterly Market Reports. Annual capacity additions and cumulative capacity may not always add up due to decommissioned, uprated and repowered wind turbines. Wind capacity data for each year is continuously updated as information changes.

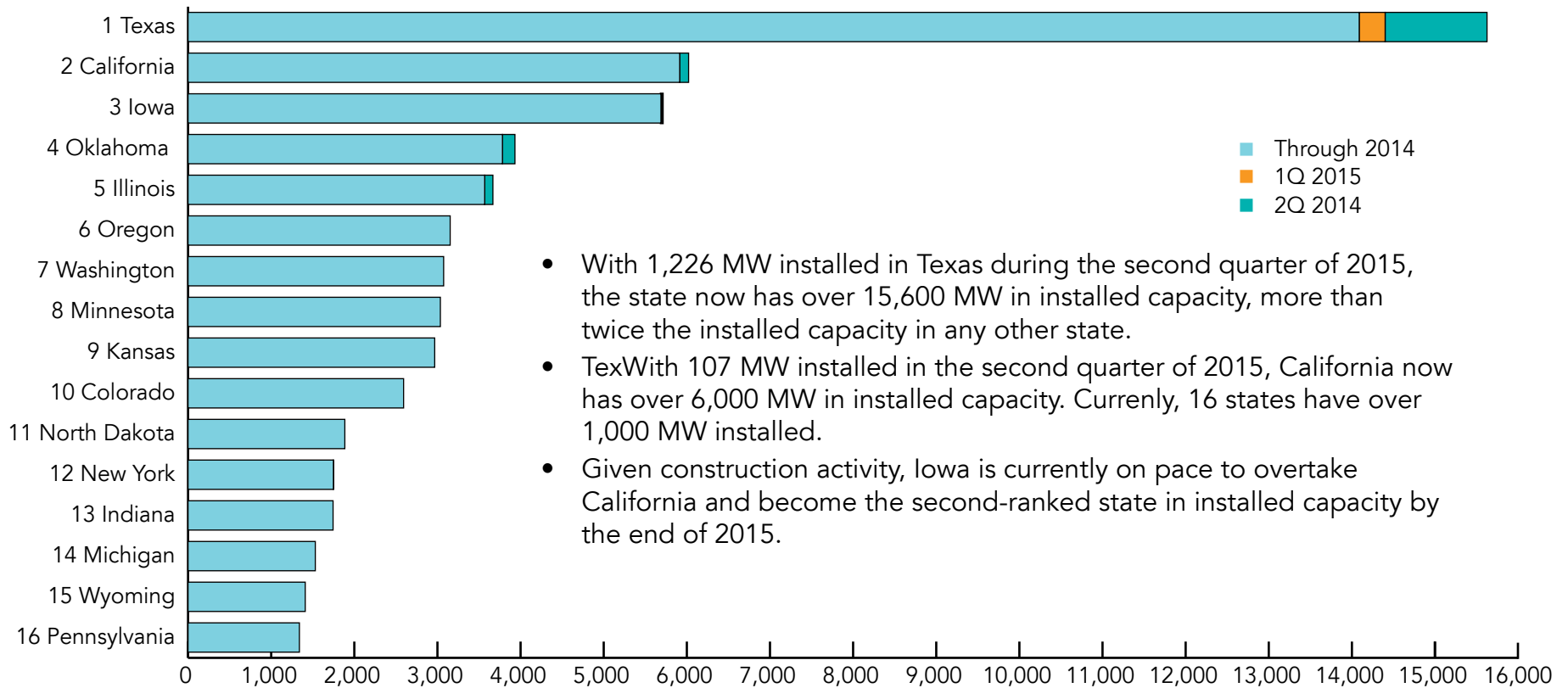
U.S. Wind Power Capacity Installations, by State



U.S. Wind Power Capacity Installations, by Quarter



U.S. Wind Power Capacity Installations, Top States



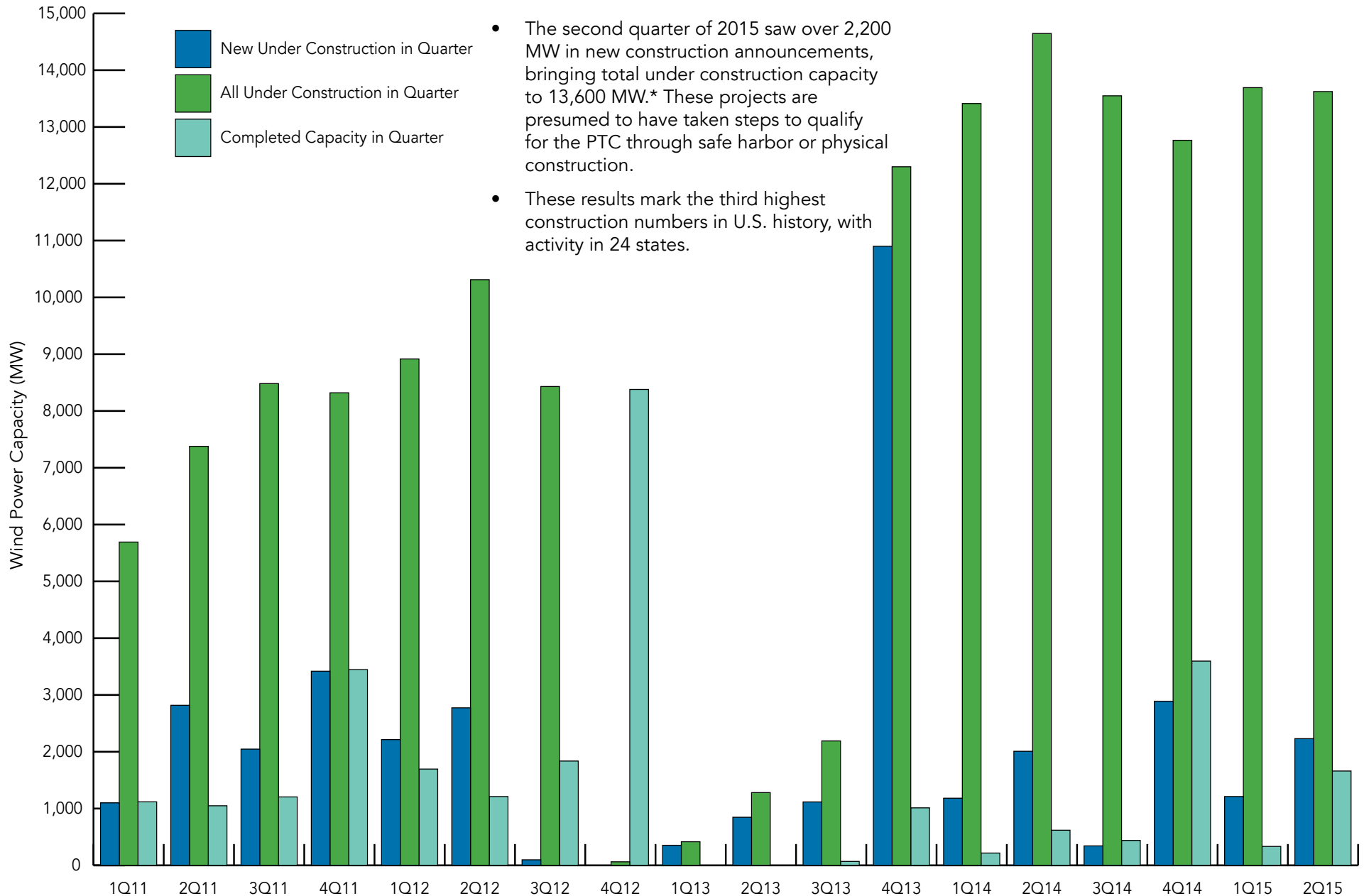
Wind Power Capacity Additions during the First Quarter 2015, Top States

State	Capacity, MW
Texas	312
Iowa	20
New York	1

Wind Power Capacity Additions during the Second Quarter 2015, Top States

State	Capacity, MW
Texas	1,226
Oklahoma	150
California	107

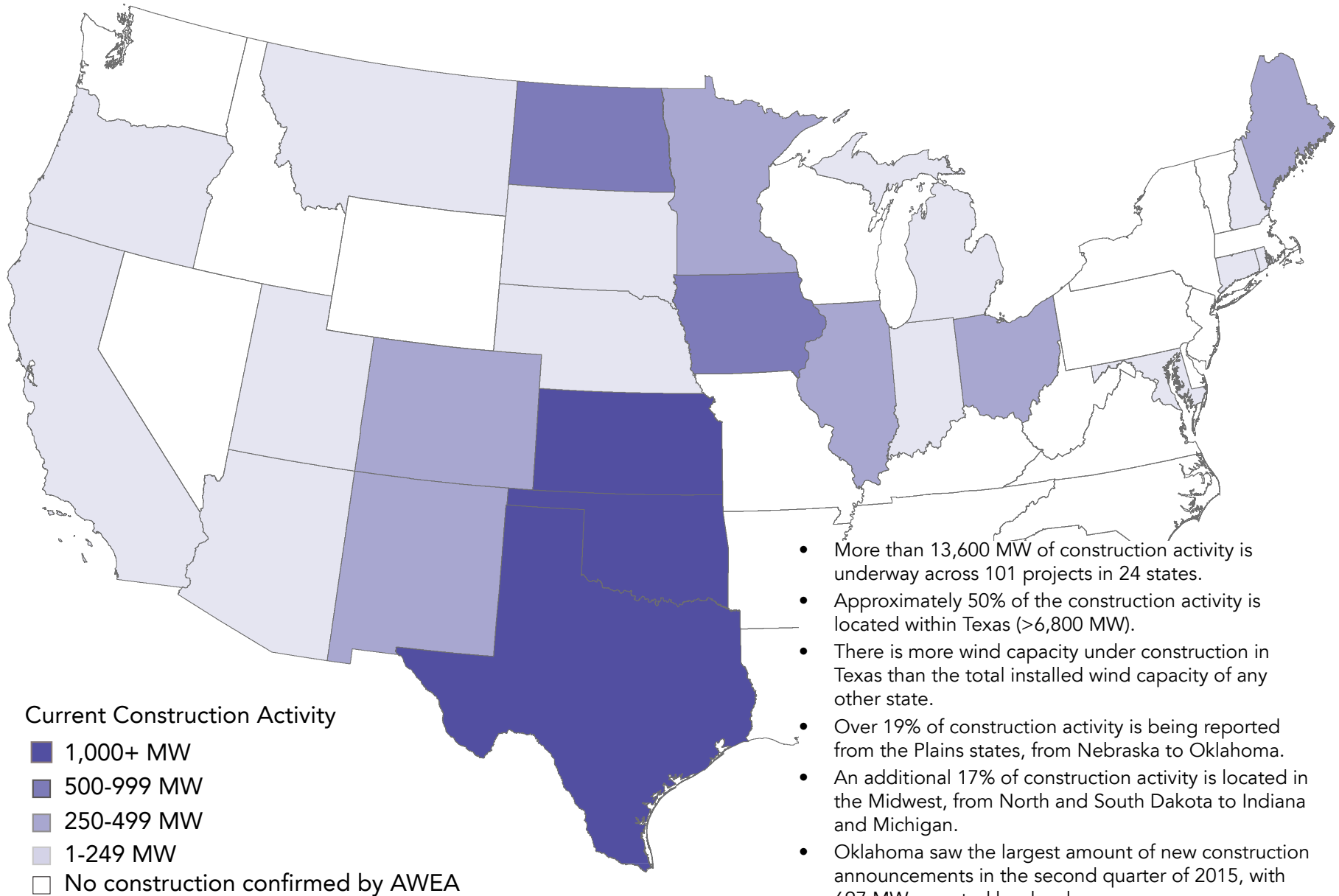
Wind Power Capacity Under Construction



- The second quarter of 2015 saw over 2,200 MW in new construction announcements, bringing total under construction capacity to 13,600 MW.* These projects are presumed to have taken steps to qualify for the PTC through safe harbor or physical construction.
- These results mark the third highest construction numbers in U.S. history, with activity in 24 states.

*Projects reported as under construction by AWEA are subject to change. A number of projects previously reported as under construction are no longer considered under construction, resulting in the observed drop in total under construction capacity.

Map of Wind Power Capacity Under Construction



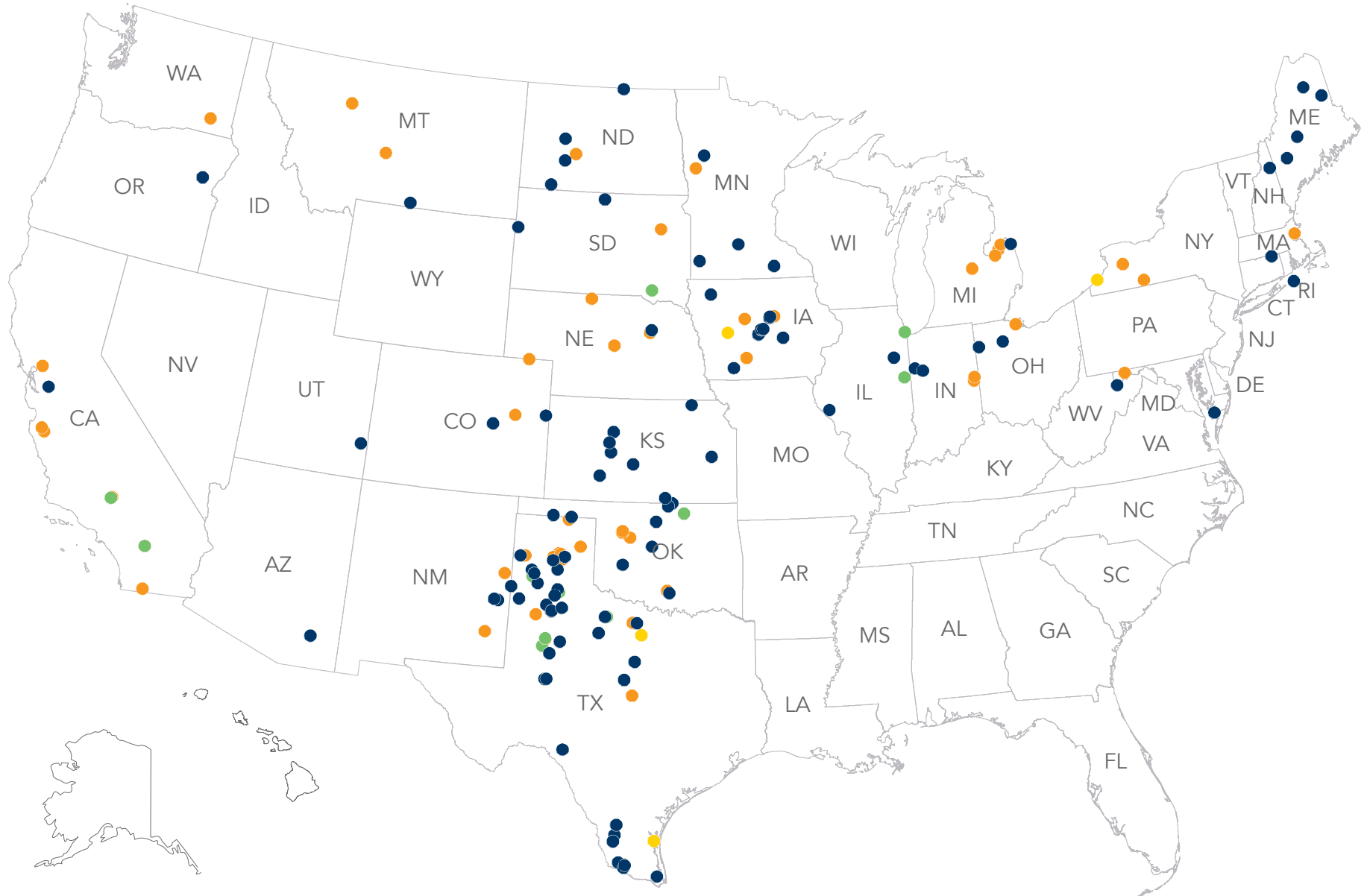
Utility-Scale Wind Projects Completed in 2015

State	Project Name	Project Capacity, MW	Turbine OEM	Turbine Model	Project Developer	Project Owner	Power Purchaser
First Quarter 2015							
IA	Carroll Area	20.00	Siemens	SWT-2.3-108	Own Energy	NJR Clean Energy Ventures	MidAmerican Energy
NY	New York State Thruway Authority	1.10	Vergnet	GEV MP-R	New York State Thruway Authority	New York State Thruway Authority	
TX	Baffin*	202.00	Gamesa	G97-2.0	Iberdrola Renewables	Iberdrola Renewables	Merchant (ERCOT)
TX	Keechi	110.00	Vestas	V100-2.0	RES Americas	Enbridge	Microsoft
Second Quarter 2015							
CA	Rising Tree South	99.00	Vestas	V112-3.3	EDP Renewables North America LLC	EDP Renewables North America LLC	Southern California Edison
CA	San Geronio Farms Wind Farm	8.00	Refurbished Vestas	V42	San Geronio Farms	San Geronio Farms	Southern California Edison
IL	Hoopston Wind	98.00	Vestas	V100-2.0	Apex Clean Energy	IKEA	Merchant (ERCOT)
IL	Method Manufacturing Plant	0.60	Refurbished NEG Micon	NM48	Rockwind Venture Partners	Method Products	Method Products
OK	Osage Wind	150.36	GE Energy	1.7-100	TradeWind Energy	Enel Green Power North America	Associated Electric Cooperative Inc.
SD	Beethoven Wind, LLC	79.55	GE Energy	1.85-87	BayWa r.e. Wind, LLC	BayWa r.e. Wind, LLC	NorthWestern Energy
TX	Green Pastures	150.00	Acciona Wind-power	AW-3000/116	Pioneer Green	Capital Dynamics	Merchant Hedge Contract
TX	Jumbo Road	299.70	GE Energy	1.85-87	Lincoln Renewable Energy	BHE Renewables	Austin Energy
TX	Longhorn	200.00	Vestas	V100-2.0	EDF Renewable Energy; RES Americas	EDF Renewable Energy; BlackRock	Merchant (ERCOT)
TX	Los Vientos III	200.00	Vestas	V110-2.0	Duke Energy	Duke Energy	Austin Energy
TX	Mesquite Creek	211.22	GE Energy	1.7-100	BNB Renewables; Sumitomo Corporation of America	Sumitomo Corporation of America	Merchant (ERCOT)
TX	Stephens Ranch II	164.68	GE Energy	1.7-100	Wind Tex Energy and Mesa Power	Starwood Energy	Merchant (ERCOT)

*The 202 MW Baffin wind project was not included in the AWEA U.S. Wind Industry First Quarter 2015 Market Report.

Map of Projects Online & Under Construction in 2015

● Projects Online 2014 ● Projects Online 1Q 2015 ● Projects Online 2Q 2015 ● Projects Under Construction as of 2Q 2015



For more information on AWEA market analysis, please visit www.awea.org/marketreports where you can access older versions of the Quarterly Market Reports and see the latest Annual Market Report.

The AWEA U.S. Wind Industry Second Quarter 2015 Market Report can be accessed at www.awea.org/2Q2015

For a spreadsheet with underlying data or with any corrections, please contact Hannah Hunt at hhunt@awea.org