The wind sector recorded the slowest growth in its history in Spain in 2011

- Total installed power stood at 21,673 MW, having increased by 1,050 MW – 5.1% with regard to the previous year
- At the present time, there are 1,903 MW recorded in the Pre-allocation Register and pending commissioning, of which half are undergoing construction problems
- According to the main manufacturers, less than 10% of the production of wind turbines carried out in Spain is for domestic orders
- AEE considers it urgent to start working with the Government to design a regulatory system adapted to the economic situation of the country, in order to ensure the future development of the sector and avoid placing the more than 30,000 jobs it represents at risk

Madrid, 31st January 2012. The wind sector installed 1,050 MW in Spain in 2011, representing an annual increase of 5.1% of accumulated power, which stood at 21,673 MW on 31 December. This is the slowest growth in the history of wind power in Spain in percentage terms. These data mean that wind power is below the target of 22,119 MW set by the previous Government for 2011.

Royal Decree-law 1/2012, published last Saturday, on the one hand, guarantees the current economic basis for installed power and pre-registered farms and, on the other, suspends the incentives to facilities that are not registered in the Pre-allocation Register. The lack of signs regarding the future involves a major risk to the wind industry and the more than 30,000 people it employs: the lack of orders for wind turbines has already led to major restructuring and the relocation of manufacturers to other countries is likely. According to the main manufacturers, currently less than 10% of the production carried out in Spain is for domestic orders. Indeed, the 1,050 MW installed in Spain in 2011 are from orders for wind turbines made in previous years, as the long period of maturation of wind projects –seven years on average- requires placing orders at the factory from 1.5 to two years in advance.

Therefore, **AEE** considers it urgent to start working with the Government immediately to design an economic system which, bearing in mind the difficult economic situation of Spain, allows the sector to develop.

In this regard, the new regulations should take into account the high degree of maturity and competitiveness of wind power, whose impact on the rate deficit was zero in 2011, which represents 0.28% of the Spanish GDP, which exports more than 2 billion Euros a year, and which prevents nearly 2 billion Euros of fossil fuel imports, thus helping curb the current account deficit.

2012 is the final year of the Pre-allocation Register, in which a total of 1,903 MW are registered and pending commissioning. Of these, 970 MW are undergoing construction problems for reasons not attributable to the promoters –such as delay in the planning of the transport network and distribution lines, and administrative difficulties- or lack of economic viability. These megawatts with problems account for half of the power registered and to be installed this year.

In addition, **AEE** considers it necessary for the Ministry to maintain the quota of 600 MW for wind farms in the Canaries established in Royal Decree 1614/2010.

Castilla y León, in the lead in 2011

According to the data collected by **AEE**, which monitors all the companies of the sector in Spain and uses the criterion of final start-up act to make the calculations, in 2011 Castilla y León installed 44% of the total power in 2011, with 462 new MW, and therefore continues to lead the ranking (see attached table). Valencia, with 183 MW, and Catalonia, with 153 MW, were the next communities where most wind farms were built. On the other hand, a total of eight autonomous communities installed no new power in 2011, including some that enjoy the highest wind resources, such as Galicia.

Only seven wind farm promoting companies have installed 50 MW or more in 2011: EyRA, EDPR, Enel Green Power España, Acciona Energía, Iberdrola, VAPAT and E.ON (see table).

As for manufacturers, Gamesa wind turbines were those to add the most power (461.15 MW), followed by those of Vestas (207.40 MW).

Although wind power generation in 2011 was lower than in 2010, wind power covered 15.75% of annual electricity demand, according to data of Red Eléctrica de España (REE). Wind power prevented the emission of 22 million tonnes of CO_2 in 2011.

Distribution of Installed Power by Autonomous Community

(in order of accumulated power)

Autonomous Community	Installed power in 2011 (MW)	Accumulated power at end of 2011 (MW)	Rate of change
Castilla y León	462.19	5,233.01	9.70%
Castilla La Mancha	26.50	3,736.79	0.70%
Galicia	0	3,272.17	0%
Andalucía	92	3,066.93	3.10%
Aragón	50	1,811.31	2.80%
Com. Valenciana	183	1,169.99	18.50%
Cataluña	153.71	1,003.35	18.10%
Navarra	8.50	976.92	0.90%
La Rioja	0	446.62	0%
Asturias	72.50	428.45	20.40%
Murcia	0	189.96	0%
País Vasco	0	153.25	0%
Canarias	1.70	145.78	1.20%
Cantabria	0	35.30	0%
Baleares	0	3.68	0%
TOTAL	**1,050**	**21,673**	**5.10%**

Source: AEE

Autonomous Communities with no installed wind power not included.

Distribution of Installed Power by Promoters

(in order of accumulated power)

PROMOTER	Installed power in 2011 (MW)	Percentage over total installed in 2011	Accumulated at end of 2011 (MW)	Market share over accumulated
IBERDROLA	101.08	9.63%	5,327.65	24.58%
ACCIONA ENERGÍA	127.50	12.14%	4,164.32	19.21%
EDPR	155.01	14.76%	1,997.60	9.22%
ENEL GREEN POWER ESPAÑA	129.45	12.33%	1,380.50	6.37%
GAS NATURAL FENOSA RENOVABLES	0	0%	956.00	4.41%
EyRA	238.50	22.71%	806.16	3.72%
OLIVENTO, S.L.	0	0%	420.79	1.94%
RWE Innogy Aersa, S.A.U.	0	0%	420.29	1.94%
ENERFÍN	0	0%	395.34	1.82%
VAPAT	89.40	8.51%	380.05	1.75%
E. ON Renovables	50	4.76%	378.92	1.75%
EOLIA RENOVABLES	10.50	1%	378.74	1.75%
MEDWIND (*)	0	0%	245.25	1.13%
MOLINOS DEL EBRO	0	0%	235.16	1.09%
GECAL, S.A.	0	0%	231.41	1.07%
IBEREÓLICA	8.33	0.79%	174.90	0.81%
EÓLICA DE NAVARRA	16	1.52%	164.13	0.76%
GAMESA ENERGÍA	13.20	1.26%	161.29	0.74%
FERSA	0	0%	141.88	0.65%
ELECDEY	0	0%	140.10	0.65%
INVERDUERO EÓLICA, S.L.	27.49	2.62%	114.69	0.53%
RENOVALIA	0	0%	103.98	0.48%
OTROS	83.68	7.97%	2,954.41	13.63%
TOTAL	**1,050**	**100%**	**21,673**	**100%**

Source: AEE

The criterion used by AEE to calculate installed power is the Record of Commissioning of the farms, which does not always coincide with the data published by the promoters.

The total figure per promoter is linked to the power attributed according to their percentage share in the wind farms.

(*) Renomar has a total of 490.5 MW. Acciona controls 50% of this company, so the table only reflects the 50% corresponding to Medwind.

Distribution of Installed Power by Manufacturers

(in order of accumulated power)

MANUFACTURER	Installed power in 2011 (MW)	Percentage over total installed in 2011	Accumulated at endo of 2011 (MW)	Market share over accumulated
GAMESA	461.15	43.90%	11,510.16	53.10%
VESTAS	207.40	19.80%	3,733.49	17.20%
Alstom -Ecotècnia	68.11	6.50%	1,629.54	7.50%
ACCIONA WIND POWER	102	9.70%	1,556.13	7.20%
GE	163.44	15.60%	1,366.64	6.30%
SIEMENS	48	4.60%	772.40	3.60%
ENERCON	0	0%	485.03	2.20%
SUZLON	0	0%	218.00	1.00%
NORDEX	0	0%	135.18	0.60%
DESA	0	0%	100.80	0.50%
LAGERWEY	0	0%	37.50	0.20%
M-TORRES	0	0%	36.90	0.20%
Kenetech	0	0%	36.90	0.20%
REPOWER	0	0%	25.00	0.10%
OTROS	0	0%	17.29	0.10%
Fuhrlander	0	0%	12.50	0.10%
WINDECO	0	0%	0.05	0%
TOTAL	**1,050**	**100%**	**21,673**	**100%**

Source: AEE

For further information:

AEE Communications Department

Tel. 91 745 12 76

comunicacion@aeeolica.org

www.aeeolica.org