

Press Release · Pressemitteilung

16th WindEnergy trend:index: Mood in the global wind industry improves – decline in Germany continues

Hamburg, 16 December 2025 – The current edition of the WindEnergy trend:index (WETix) reveals – after a marked decline last spring – a slight improvement of the mood in the global wind energy sector this autumn. However, there are significant regional differences: While the outlook in Asia and the rest of the world is clearly trending upwards, Germany is conspicuously losing momentum. North America is the only region with an utterly negative mood, if with a slight improvement.

Asia on a vigorous upswing – Germany continues to slip

A moderately positive mood is discernible in nearly all regions, with Asia leading the statistics: for the first time in years, the mood is returning to former record levels. In the current survey, the region reveals the most pronounced upward trend, confirming continued strong market activity.

As for Europe, the mood remains essentially positive if with some losses. Germany continues to backslide, now ranging well below the European average. This decline reflects continued structural challenges when it comes to permitting, site availability, grid connections and the regulatory landscape.

The rest of the world is clearly trending in a positive direction, reminiscent of past surveys.

North America remains the only region with an undeniably negative market environment

North America is the exact opposite of the global development, with all categories surveyed continuously in the negative quadrant. Reasons include a changed political landscape in the USA, delayed incentives as well as project cancellations which impact both short-term and long-term expectations. Thus, North America remains the only region consistently showing assessments below the neutral mark.

Economic environment: disparate trends; Germany falling further behind

While the international environment for onshore wind is seen in a slightly better light, it fails to reach the high levels of past years. Meanwhile in Germany, assessments continue to slump.

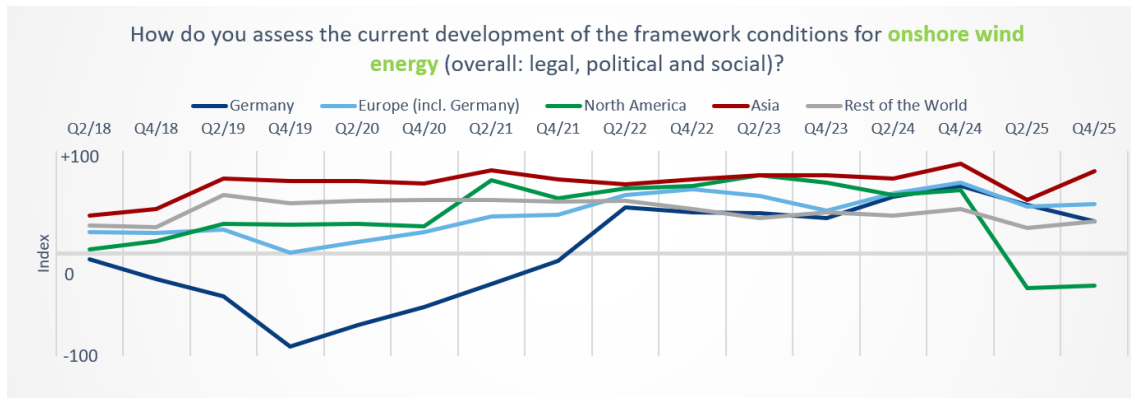


Figure 1: Assessment of the global market for onshore wind energy within the next twelve months

The mood about the offshore segment has improved somewhat in Asia, North America and the rest of the world. Europe and Germany continue to decline, most markedly Germany, where complex regulations, grid connection bottlenecks, and unclear assumptions regarding expansion goals are showing the strongest effects. Failed open tenders aren't helpful either.

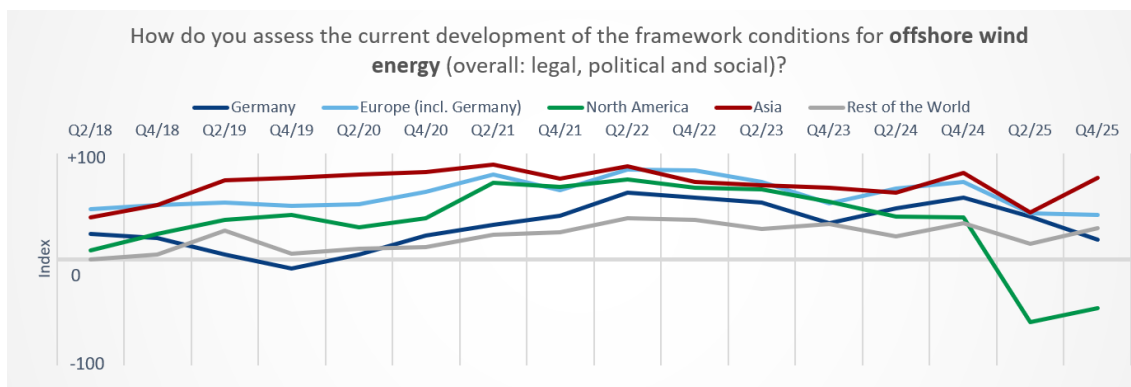


Figure 2: Assessment of the global market for offshore wind energy within the next twelve months

Market development: more optimistic short-term outlook; long-term expectations drifting apart

In the short term (twelve-month outlook), the mood in the global onshore market has improved slightly. Here again, Germany is at the tail end. As for long-term (two-year) expectations,

- Asia is surging ahead,
- Europe is moderately positive but declining,
- Germany's structure-induced downswing is most pronounced,
- North America is recovering slightly but remains sub-zero.

The pattern in the offshore segment is similar: a slight recovery on the international stage is contrasted by Germany's continued drop.

Germany: Still positive but far below past values

The German market is still receiving positive assessments but much less so than in past surveys. Its distance behind Europe keeps getting wider – a new trend indicating that the in-country conditions are increasingly perceived as barriers.

The discrepancy between the government's expansion goals and actual implementation is becoming ever more evident.

Turbine sizes by 2030: Expectations stabilising – growth reaches natural limits

The industry's expectations for turbine sizes by 2030 are settling in, a fact that may have to do with the approaching target year. New onshore wind turbines are forecast to have an average output rating of 8.3 megawatts by 2030, slightly less than in past surveys. Predictions for the offshore segment are likewise dropping a bit to 19.2 megawatts on average. This shows that the industry is abandoning some of its past highly ambitious growth expectations, now putting more weight on what is economically feasible and technically proven from the perspectives of both, suppliers and operators.

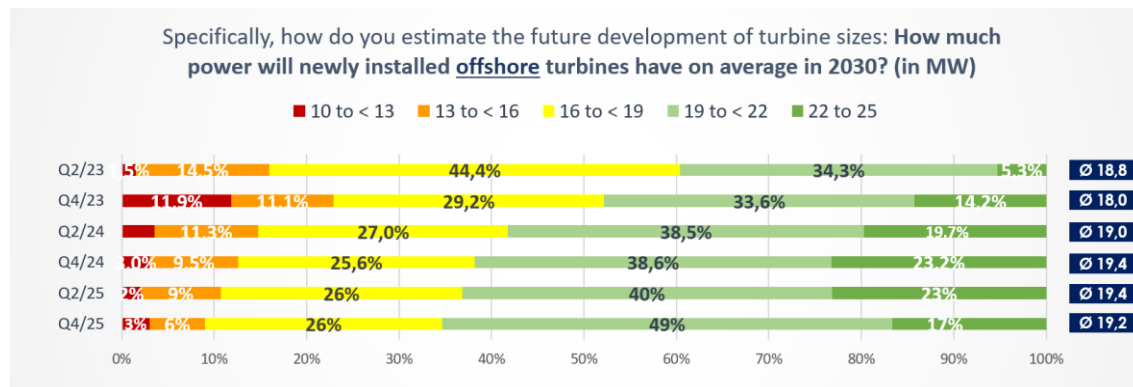


Figure 3: Assessment of offshore wind turbine sizes by the year 2030

Saving potential inherent in new technologies: Optimism increases somewhat

A positive development is seen in the assessments of saving potential enabled by advanced technologies. This optimism had once started at a relatively modest level and is improving, particularly so in the offshore segment. Economies of scale, more efficient installation techniques, and new production technologies are seen as key enablers of cost reductions.

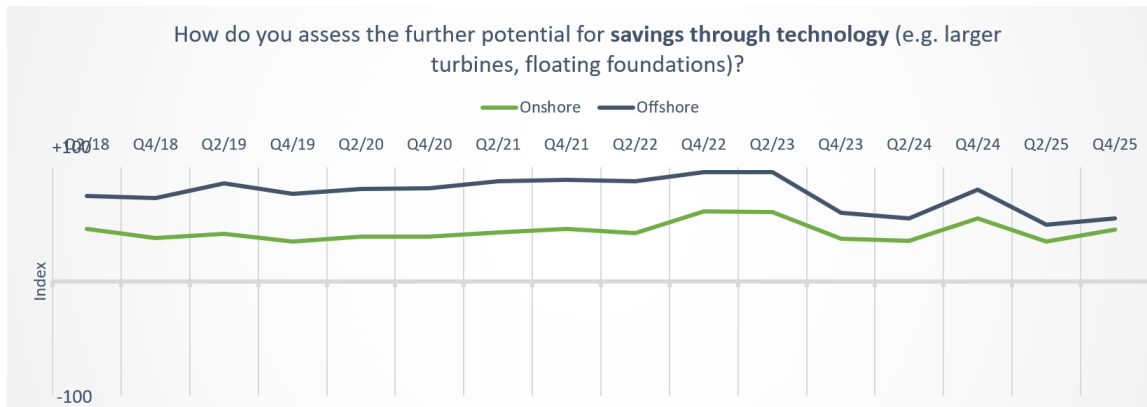


Figure 4: Assessment of saving potential inherent in technologies (such as larger turbines, floating bases)

Broad participation by representatives of all stages of the value chain

The full cohort of survey respondents once again represents a broad spectrum of value chain segments. Project development, operation and maintenance, and the manufacturing segment are all well represented, delivering a balanced picture of the mood in the global industry. Market stakeholders in Europe and Germany constitute the largest portion of respondents, followed by Asia and North America. This means that this WETix again reflects regional developments comprehensively and reliably.

About the WindEnergy trend:index

The WindEnergy trend:index, a mood barometer for the wind industry, is jointly compiled by WindEnergy Hamburg, the world's leading wind energy exhibition, and wind:research, one of the leading wind energy market research institutes. The survey focuses on examining the potential of wind energy, covering both the onshore and offshore segments. Nearly 700 respondents took part in the current survey between September and early November 2025, sharing their assessments of the developments in the global onshore and offshore wind industry. The WETix index covers all onshore and offshore regions globally. The following market regions were defined: Germany, Europe (including Germany), North America, Asia, and Rest of World (RoW). Around 14 per cent of respondents work in the offshore segment exclusively and roughly 38 per cent are primarily active in the onshore segment. About 43 per cent are involved in both the onshore and offshore segments. Companies identifying as "other" (1 per cent) often hail from the hydrogen or photovoltaics industries. The 15th edition of the WETix survey was the first one to be offered in Spanish, as well.

About WindEnergy Hamburg

From 22 to 25 September 2026, WindEnergy Hamburg, the world's leading wind industry fair, will once again be the pivotal networking hub for experts, companies and investors from around the world: in eleven exhibition halls on the Hamburg Messe und Congress GmbH campus, right in the heart of the vibrant northern German port city, more than 1,600 companies from roughly 40 countries will present their innovations and solutions to 43,000 participants from around 100 different nations. Covering 80,000 square metres of exhibition floor, equipment manufacturers and suppliers representing all stages of the value chain for onshore and offshore wind energy will provide a comprehensive market overview. The new Energy Storage expo area, located in a hall of

its own (A2) with roughly 3,600 square metres of floor space, will put the spotlight of the flagship fair on energy storage technology. The exhibition will be accompanied by freely accessible conference sessions where top-ranking experts will address the industry's key topics. Featuring more than 300 renowned speakers on six open stages, this free conference programme is organised by the WindEnergy Hamburg team jointly with its partners, including the Global Wind Energy Council (GWEC), the European industry organisation WindEurope, the national industry associations Verband Deutscher Maschinen- und Anlagenbau (VDMA) and Bundesverband WindEnergie (BWE), as well as leading industry media and enterprises.

Opening hours and further information

WindEnergy Hamburg 2026 will open from 10:00am to 06:00pm Tuesday 22 September to Thursday 24 September, and from 10:00am to 04:00pm on Friday 25 September. It is accessible from the entrances at Messeplatz (Centre), St. Petersburger Straße (East), Karolinenstraße (South) und Lagerstraße (West).

All visitors in possession of an online ticket will be able to travel to the flagship fair in an especially sustainable manner: Every visitor ticket purchased online includes a ticket to and from the fair on Hamburg's public transport system.

For more information as well as photos and press releases for downloading, please visit [Join the global on & offshore event - WindEnergy Hamburg](#) or the [LinkedIn](#) or [Instagram](#) channels.

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For questions regarding the contents, interpretation and methodology of the survey or to learn more about wind:research please contact: presse@windresearch.de

About wind:research:

The market research institute wind:research prepares market studies and analyses as well as expert reports, through to M&A services for the wind energy sector, delivering detailed insights for strategy development to energy utilities, project developers, operators, component and turbine manufacturers as well as municipal, state and federal governments. In addition, it publishes weekly clippings on a wide range of topics such as hydrogen. For further information go to: www.windresearch.de