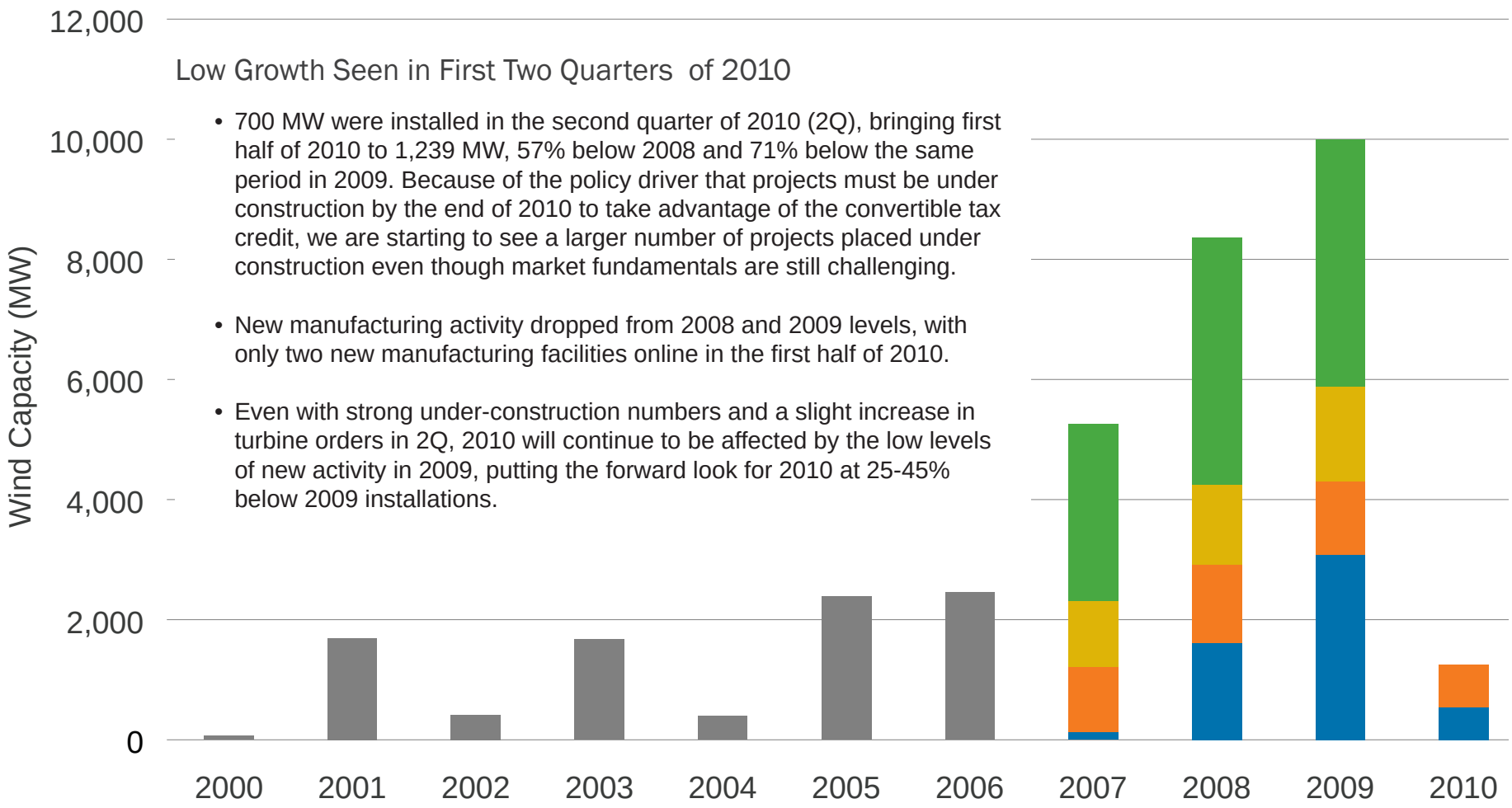
AWEA Mid-Year 2010 Market Report

July 2010

The U.S. wind industry installed 700 megawatts (MW) of new generating capacity in the second quarter of 2010. With about 1,240 MW installed so far in 2010, the total installed wind capacity in the U.S. is now over 36,300 MW. At mid-year, U.S. installations of new wind generating capacity remained far below levels for the comparable periods in 2008 and 2009, and projections indicate that total new installations for 2010 as a whole will be more in line with 2007 installation numbers than what we have seen in the past two years.

AWEA AMERICAN WIND ENERGY ASSOCIATION

U.S. Annual Wind Power Installations



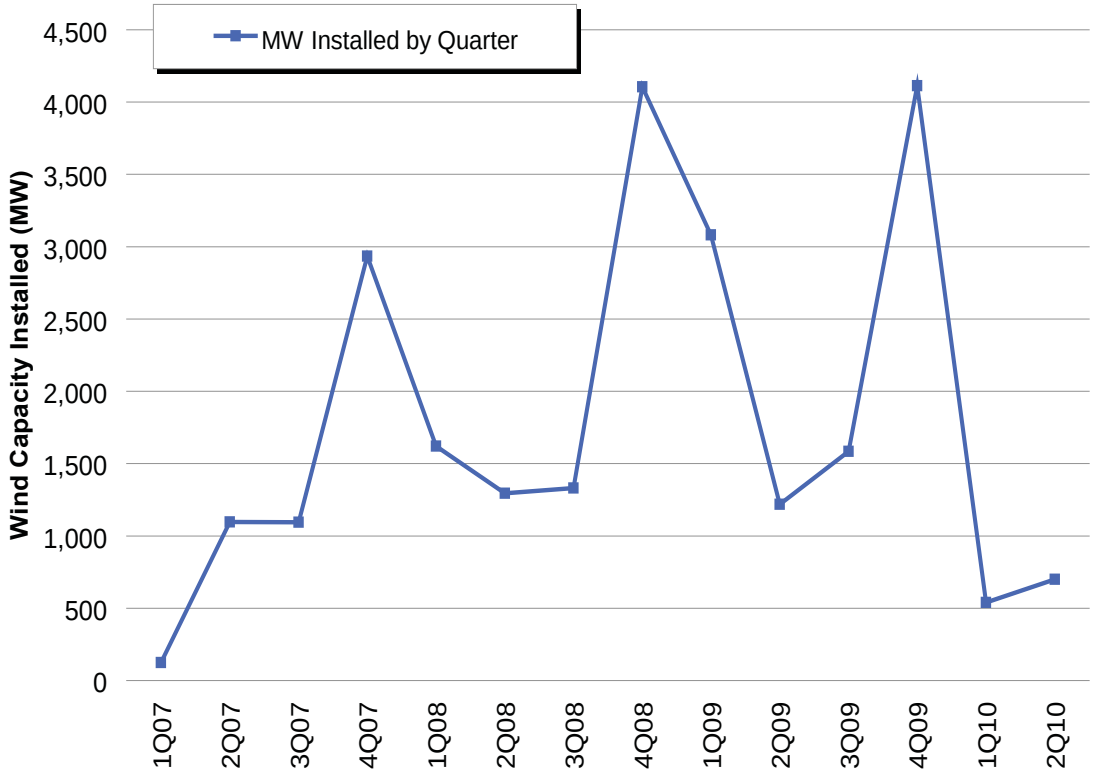
Low Growth Seen in First Two Quarters of 2010

- 700 MW were installed in the second quarter of 2010 (2Q), bringing first half of 2010 to 1,239 MW, 57% below 2008 and 71% below the same period in 2009. Because of the policy driver that projects must be under construction by the end of 2010 to take advantage of the convertible tax credit, we are starting to see a larger number of projects placed under construction even though market fundamentals are still challenging.
- New manufacturing activity dropped from 2008 and 2009 levels, with only two new manufacturing facilities online in the first half of 2010.
- Even with strong under-construction numbers and a slight increase in turbine orders in 2Q, 2010 will continue to be affected by the low levels of new activity in 2009, putting the forward look for 2010 at 25-45% below 2009 installations.

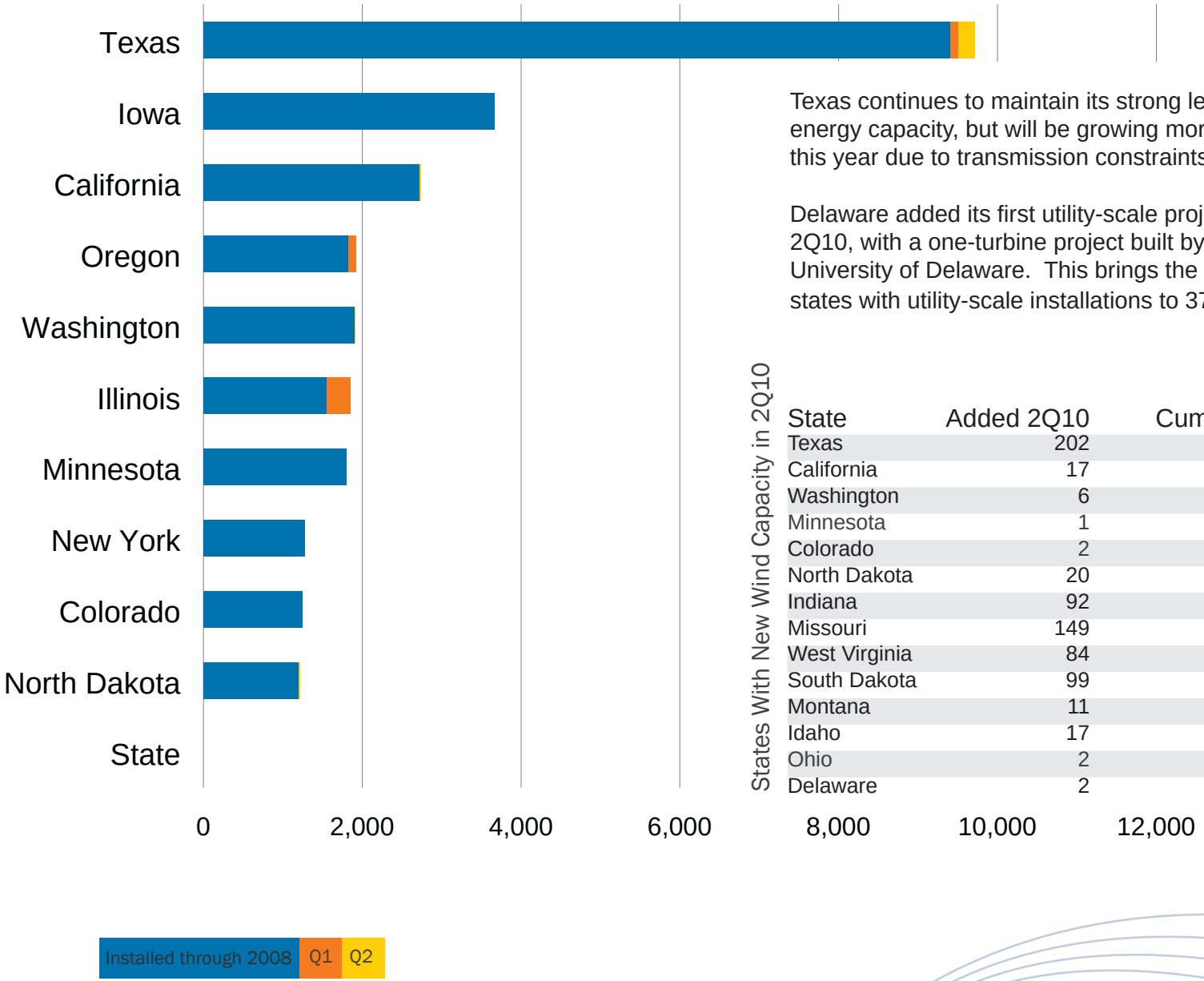
U.S. Wind Power Installations by Quarter

- The boom-and-bust cycle that has developed due to short-term incentives is not conducive to business investment and increased employment.

- This chart of new installations of wind generating capacity by quarter clearly illustrates the consequences of on-again, off-again short-term federal incentives for wind as a market signal. In that connection, it's important to understand that wind projects can be built so quickly (in six months to a year) that the entire pace of activity in the wind industry can be driven by the month-to-month prospects of, say, a tax incentive extension pending before Congress.



Wind Project Installations by State (Top Ten States)



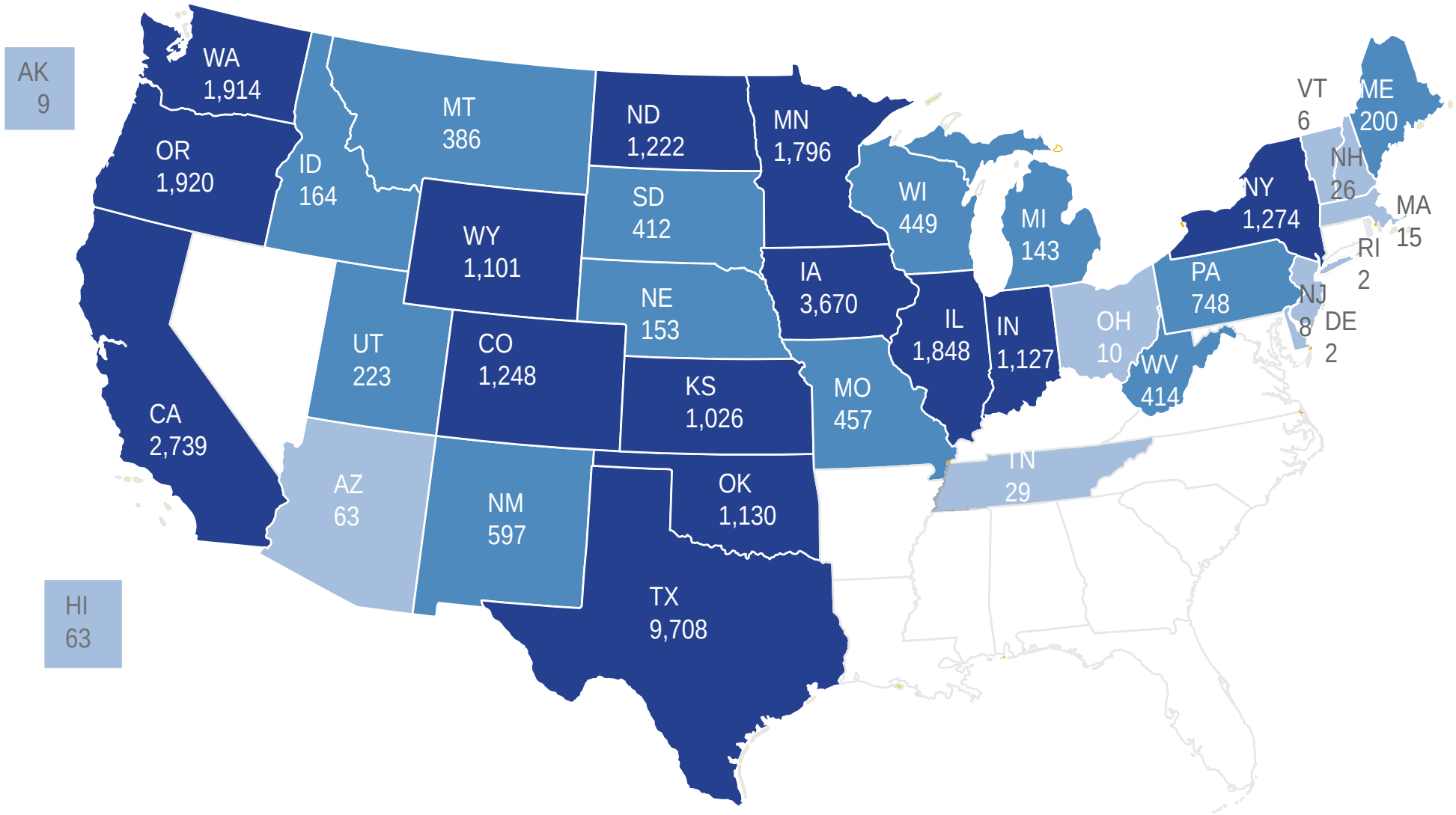
Texas continues to maintain its strong lead in wind energy capacity, but will be growing more slowly this year due to transmission constraints.

Delaware added its first utility-scale project in 2Q10, with a one-turbine project built by the University of Delaware. This brings the number of states with utility-scale installations to 37.

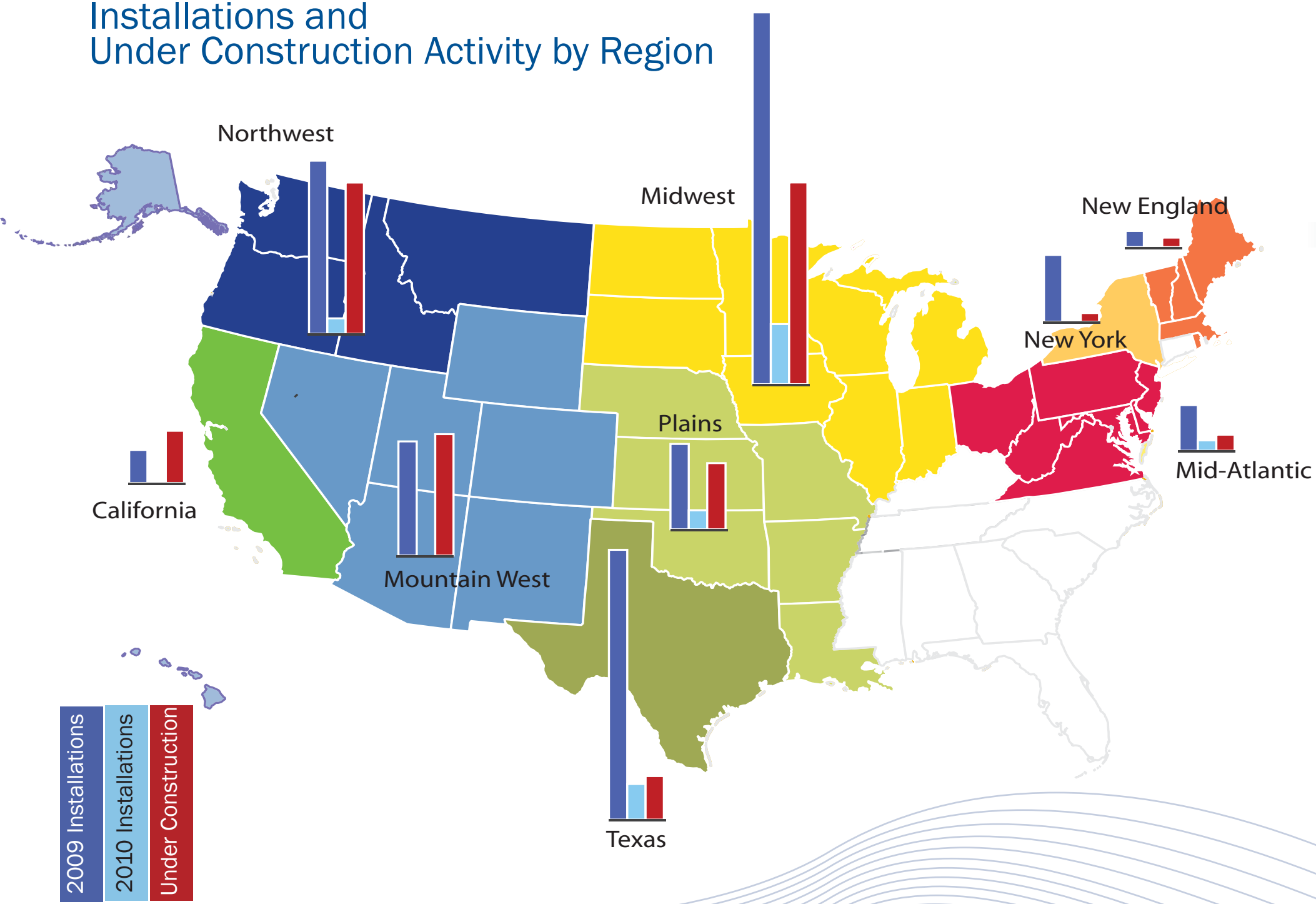
States With New Wind Capacity in 2Q10

State	Added 2Q10	Cumulative
Texas	202	9708
California	17	2739
Washington	6	1914
Minnesota	1	1796
Colorado	2	1248
North Dakota	20	1222
Indiana	92	1127
Missouri	149	457
West Virginia	84	414
South Dakota	99	412
Montana	11	386
Idaho	17	164
Ohio	2	10
Delaware	2	2

Cumulative Wind Capacity by State

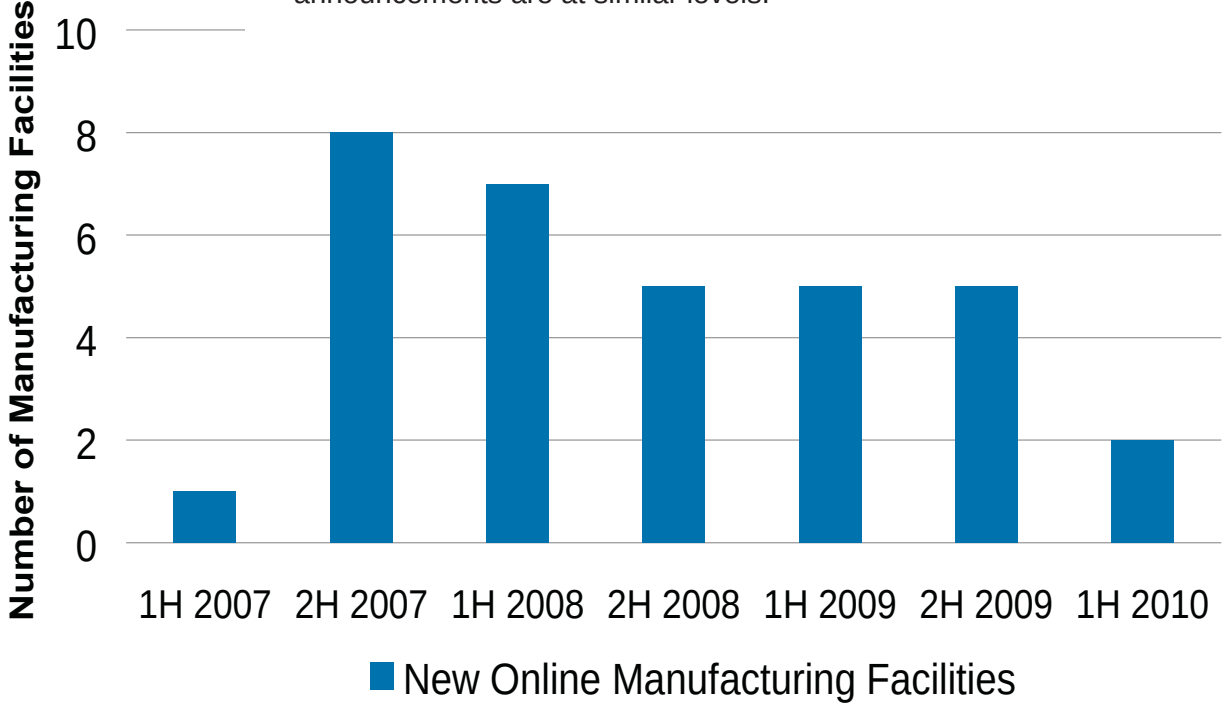


Installations and Under Construction Activity by Region



New Manufacturing Activity Continues to Stall

- Two facilities were brought online in the first half of 2010, as compared to five facilities brought online in 1H/2009 and 7 facilities brought online in 1H/2008. New announcements are at similar levels.



New Wind Power Projects Added in Second Quarter of 2010

Table 1 lists new wind power projects that have been brought on-line and commissioned in the second quarter of 2010, as reported to AWEA by its project developer and manufacturer member companies. As long as project is producing power, project commissioning date is at discretion of project owner. Results are preliminary. "n/a" means not available to AWeA at this time.

State	Project Name	Capacity (in MW)	Number of Turbines	Turbine Rating (in MW)	Turbine Manufacturer	Project Developer	Power Purchaser
Total Cumulative Installed		**36,303**	**> 33,700**				
Q2 2010		**700**	**416**				
CA	Pine Tree extension	15	10	1.5	GE Energy	LADWP	LADWP
CA	Teichert Aggregates	1.5	1	1.5	GE Energy	Foundation Windpower	Teichert Aggregates
CO	Pueblo Towers	1.8	1	1.8	Vestas	Vestas Towers	Vestas Towers
DE	University of Delaware	2	1	2	Gamesa	First Marine Wind	University of Delaware
ID	Tuana Springs	16.8	8	2.1	Suzlon	John Deere Wind	Idaho Power
IN	Meadow Lake II 2Q10	91.5	61	1.5	Acciona WP	Horizon-EDPR	n/a
MN	Woodstock Municipal Wind	0.75	1	0.75	EWT Americas	Xcel Energy	Xcel Energy
MO	Lost Creek Ridge Wind Farm	148.5	99	1.5	GE Energy	Wind Capital Group	Associated Electric Cooperative Inc. (AECI)
MT	Diamond Willow extension	10.5	7	1.5	GE Energy	Montana-Dakota Utilities	Montana-Dakota Utilities
ND	Cedar Hills	19.5	13	1.5	GE Energy	Montana-Dakota Utilities	Montana-Dakota Utilities
OH	Conneaut Middle School	0.6	1	0.6	Elecon	NexGen Energy Partners	Conneaut Middle School
OH	Conneaut Waste Water Treatment	0.4	1	0.4	n/a	NexGen Energy Partners	Conneaut Waste Water Treatment
OH	Sandusky Waste Water Treatment	0.6	1	0.6	Elecon	NexGen Energy Partners	Sandusky Waster Water Treatment

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Q2 2010		**700**	**416**				
OH	Sandusky Water Filtration	0.4	1	0.4	n/a	NexGen Energy Partners	Sandusky Water Treatment
SD	Day County Wind Project	99	66	1.5	GE Energy	NextEra Energy	Basin Electric
TX	Penescal II	201.6	84	2.4	Mitsubishi	Iberdrola Renewables	76.8 MW for CPS San Antonio; 50 MW for South Texas Electric Cooperative: 74.8 MW merchant
WA	Coastal Energy	6	4	1.5	GE Energy	Coastal Energy, LLC	n/a
WV	Beech Ridge (Q2)	84	56	1.5	GE Energy	Invenergy	AEP-Appalachian Power

New Wind Power Projects Added in First Quarter of 2010

Table 2 lists new wind power projects that were brought on-line and commissioned in the first quarter of 2010, as reported to AWEA by its project developer and manufacturer member companies. As long as project is producing power, project commissioning date is at discretion of project owner. Results are preliminary. "n/a" means not available to AWeA at this time.

State	Project Name	Capacity (in MW)	Number of Turbines	Turbine Rating (in MW)	Turbine Manufacturer	Project Developer	Power Purchaser
Total Cumulative Installed		**36,303**	**> 33,700**				
Q1 2010		**539**	**292**				
IL	Cuyaga Ridge	300	150	2	Gamesa	Iberdrola Renewables	TVA
MA	Falmouth	1.65	1	1.65	Vestas	Falmouth Wastewater Treatment	n/a
KS	Greensburg	12.5	10	1.25	Suzlon	John Deere Wind	n/a
TX	Loraine	100.5	67	1.5	GE Energy	Third Planet	n/a
OR	Star Point	98.7	47	2.1	Suzlon	Iberdrola Renewables	Modesto Irrigation District
ME	Stetson Wind expansion	25.5	17	1.5	GE Energy	First Wind	Harvard for 50%

Projects Currently Under Construction

Table 3 lists wind power projects that are currently under construction for completion in the next few years, as reported to AWEA by its project developer and manufacturer member companies. Reporting of uncer construction projects is at discretion of project owner. Results are preliminary. "n/a" means not available to AWeA at this time.

State	Project Name	Capacity (in MW)	Number of Turbines	Turbine Rating (in MW)	Turbine Manufacturer	Project Developer	Power Purchaser
Under Construction		**5,698**	**≈3,000**				
AZ	Dry Lake II	65.1	31	2.1	Suzlon	Iberdrola Renewables	Salt River Project
CA	Alta (Vestas)	150	50	3	Vestas	Terra-Gen Power	SCE
CA	Alta I (GE Energy)	150	100	1.5	GE Energy	Terra-Gen Power	SCE
CA	Hatchet Ridge	101.2	44	2.3	Siemens	RES Americas/ Pattern Energy	PG&E
CA	Montezuma	36.8	16	2.3	Siemens	NextEra Energy	
CA	San Gorgonio Farms (repower)	5	10	0.5	Vestas-RBB	San Gorgonio Farms	n/a
CO	Cedar Creek II (GE Energy)	100.8	63	1.6	GE Energy	BP Wind Energy	Xcel Energy
CO	Cedar Creek II (Nordex)	150	60	2.5	Nordex	BP Wind Energy	Xcel Energy
CO	Cedar Point Wind	250.2	139	1.8	Vestas	RES Americas	Xcel Energy
CO	Kit Carson Project	51	34	1.5	GE Energy	Duke Energy	Tri-State
ID	Goshen North	124.5	83	1.5	GE Energy	BP Wind Energy/ Ridgeline Energy	SCE
IL	Big Sky Wind Facility	239.4	114	2.1	Suzlon	Edison Mission Group	n/a
IL	Top Crop II	198	132	1.5	GE Energy	Horizon-EDPR	n/a
IN	Meadow Lake II 3Q10	7.5	5	1.5	Acciona WP	Horizon-EDPR	n/a

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Under Construction		**5,698**	**≈3,000**				
IN	Meadow Lake III	103.5	69	1.5	GE Energy	Horizon-EDPR	n/a
IN	Meadow Lake IV	98.7	47	2.1	Suzlon	Horizon-EDPR	n/a
MA	Brodie Mountain	15	10	1.5	n/a	Berkshire Wind Power Cooperative	n/a
MD	Criterion	70	28	2.5	Clipper	Constellation Energy	Constellation Energy
MD	Roth Rock	50	20	2.5	Nordex	Synergics	Delmarva Power, U. of MD
ME	Kibby Mountain, phase II	66	22	3	Vestas	TransCanada	n/a
MI	Stoney Corners II	18.45	9	2.05	REpower	Heritage Sustainable Energy	Traverse City Light & Power/Detroit Edison
MI	Stoney Corners II	2.2	1	2.2	Northern Power	Heritage Sustainable Energy	Detroit Edison
MN	Adams	19.8	12	1.65	Alstom	Juhl Wind	Xcel Energy
MN	Bent Tree	201.3	122	1.65	Vestas	Alliant Energy	Alliant Energy
MN	Danielson Wind	19.8	12	1.65	Alstom	Juhl Wind	Xcel Energy
MN	Elm Creek II	148.8	62	2.4	Mitsubishi	Iberdrola Renewables	n/a
MN	Grant County	21	10	2.1	Suzlon	Juhl Wind	Xcel Energy
MN	Nobles	201	134	1.5	GE Energy	enXco	Xcel Energy
MN	Ridgewind	25.3	11	2.3	Siemens	Ridgewind Power Partners LLC	Xcel Energy

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Under Construction		**5,698**	**≈3,000**				
MN	Winona County Wind	1.5	1	1.5	n/a	n/a	Xcel Energy
ND	Bison Wind 1A	36.8	16	2.3	Siemens	Minnesota Power	n/a
NE	Crofton Hills	42	14	3	n/a	Juhl Energy Development	NPPD
NE	Flat Water	60	40	1.5	GE Energy	the juwi group	Omaha Public Power District
NE	Laredo	81	54	1.5	GE Energy	Edison Mission Group	NPPD
NM	Red Mesa	102.4	64	1.6	n/a	NextEra Energy	n/a
NY	Hardscrabble	74	37	2	Gamesa	Iberdrola Renewables	n/a
OK	Keenan II	151.8	66	2.3	Siemens	CPV Renewable Energy	OG&E
OK	Minco Wind	99.2	62	1.6		NextEra Energy	n/a
OK	Taloga	129.6	54	2.4		Edison Mission Group/Chermac	OG&E
OR	Biglow Canyon phase III	174.8	76	2.3	Siemens	Portland General Electric	Portland General Electric
OR	Leaning Juniper 2a	90.3	43	2.1	Suzlon	Iberdrola Renewables	n/a
OR	Leaning Juniper 2b	111	74	1.5	GE Energy	Iberdrola Renewables	n/a

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Under Construction		**5,698**	**≈3,000**				
SD	Buffalo Ridge II	210	105	2	Gamesa	Iberdrola Renewables	n/a
TX	Cedro Hill	150	100	1.5	GE Energy	Edison Mission Group/DKRW	CPS Energy
TX	DeWind Little Pringle # 1	10	5	2	DeWind	SWI Wind Farms	Xcel Energy
TX	DeWind Little Pringle # 2	10	5	2	DeWind	SWI Wind Farms	Xcel Energy
TX	Papalote Creek II	200.1	87	2.3	Siemens	E.On Climate & Renewables	LCRA
WA	Big Horn 2	50	25	2	Gamesa	Iberdrola Renewables	MSR Public Power Agency
WA	Juniper Canyon	151.2	63	2.4	Mitsubishi	Iberdrola Renewables	n/a
WA	Kittitas Valley	100.8	48	2.1	Suzlon	Horizon-EDPR	n/a
WA	Linden	50	25	2	REpower	enXco	SCPPA
WA	Lower Snake River Phase I	342.7	149	2.3	Siemens	PSE	PSE
WA	Vantage Point	90	60	1.5	GE Energy	Invenergy	PG&E
WI	Glacier Hills	162	90	1.8	Vestas	We Energies	We Energies
WV	Beech Ridge (Q3)	16.5	11	1.5	GE Energy	Invenergy	AEP-Appalachian Power
WY	Dunlap	111	74	1.5	GE Energy	PacifiCorp	PacifiCorp

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Under Construction		**5,698**	**≈3,000**				
WY	Top of the World (GE)	99	66	1.5	GE Energy	Duke Energy	Pacificorp
WY	Top of the World (Siemens)	101.2	44	2.3	Siemens	Duke Energy	Pacificorp

Project Definitions

Definitions (the last two – web link and WEW reference – are not currently being used in the report, and therefore will come out of the definitions for now).

Term	Abbrev.	Description	Information Source
Capacity (in Megawatts)	MW	Total nameplate capacity rating of assembly of turbines	Information as received from project developer at end of each quarter.
Completion Date		Date on which wind project is considered to be operational. Usually "Commercial Operation Date".	Specific criteria for "Completion" is at the discretion of the project developer.
Merchant or "market"		Wind power plants that are built without a traditional long-term power purchase agreement, instead selling power into a spot-market, sometimes with a hedge contract, or an option to sell the power at a certain price in the future.	Project developer or owner
Owner/Equity Partner		Company or companies that will have a managing interest in project when it is complete, though they may not have 100% ownership. Does not usually include structural equity investors.	Project developer or owner
Power Purchaser		Utility contracted to purchase power under long-term Power Purchase Agreement (PPA) contract or use the power in case of utility ownership	project developer or power purchaser
Project Developer		Company or companies managing most aspects of project development process. Is often a joint effort among several companies.	project developer
Project Name		Name supplied by project developer	project developer
Turbine Manufacturer		Turbine vendor or supplier	project developer or turbine manufacturer
Turbine Rating (in Megawatts)	MW	Nameplate capacity rating of each turbine – typically the maximum potential power output of the turbine generator	project developer