Following the late extension of the PTC and historic levels of installation during the fourth quarter of 2012, the U.S. wind industry slowed dramatically during the first half of 2013. The U.S. wind industry installed 1.6 MW during the first quarter of 2013 and 0 MW during the second quarter. The total installed wind capacity is now 60,009 MW.

Activity is now picking up, however, with utilities issuing at least 22 RFPs for wind, renewables or other capacity. Since January, over 3,950 MW of long-term power purchase agreements (PPAs) have been signed, utilities have announced more than 1,300 MW of self-builds, and as of June 30, 2013, 1,280 MW were under construction in eight states. The U.S. wind industry is gearing up to meet strong demand for more wind energy going forward.
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Summary

- Following the late extension of the Production Tax Credit (PTC) and Investment Tax Credit (ITC) plus the historic level of installations in the fourth quarter of 2012, the U.S. wind industry installed 1.6 megawatts (MW) of new capacity during the first quarter of 2013 and 0 MW during the second quarter of 2013. There are now 60,009 MW of installed wind capacity in the United States.

- There were more than 1,280 MW under construction as of June 30, 2013. These projects are spread across eight states: Alaska, California, Colorado, Kansas, Michigan, Nebraska, New York and Texas.

- Of the projects under construction, 1,132 MW of wind energy projects have long-term power offtake agreements in place. One 149 MW project is a merchant project on ERCOT. Additional wind energy capacity has secured long-term power offtake agreements but has not yet started construction.

- At least 25 power purchase agreements (PPAs) have been signed or announced this year, totalling more than 3,950 MW. These projects are spread across 11 states.

- At least 22 requests for proposals (RFPs) were issued for wind, renewables, or generic capacity due in 2013. These RFPs span 21 states and the District of Columbia.
  - 11 RFPs due in 2013 are wind-specific, totalling at least 1,300 MW of new capacity. The results for some of these RFPs have been announced and in some cases far surpass the amount of MW for which the RFP was issued.
  - 9 RFPs are for renewables, including wind.
  - 2 RFPs are for all generating sources, including wind.
  - In addition, the Massachusetts Department of Public Utilities (DPU) passed an order in March allowing Unitil, National Grid, NSTAR Electric Company and Western Massachusetts Electric Company to pursue long-term renewable energy contracts on an expedited schedule.

- In many of these RFPs, utilities are explicitly citing the 2013 PTC/ITC extension as motivation for the timing of their RFPs and in some cases have developed fast-track approval processes to take advantage of the extension.

- The IRS released guidance on PTC/ITC eligibility on April 15, 2013, allowing project developers to proceed with additional new construction in the coming months.
U.S. Wind Power Capacity Growth
U.S. Wind Power Capacity Installations by State
Wind Power Capacity Completions by Quarter

- **2008**: 1,621 MW (1Q), 1,306 MW (2Q), 1,331 MW (3Q), 541 MW (4Q)
- **2009**: 4,105 MW (1Q), 3,080 MW (2Q), 1,221 MW (3Q), 704 MW (4Q)
- **2010**: 4,114 MW (1Q), 1,589 MW (2Q), 673 MW (3Q), 417 MW (4Q)
- **2011**: 3,298 MW (1Q), 1,118 MW (2Q), 1,050 MW (3Q), 1,205 MW (4Q)
- **2012**: 3,446 MW (1Q), 1,695 MW (2Q), 1,211 MW (3Q), 1,837 MW (4Q)
- **2013**: 8,380 MW (1Q), 2,000 MW (2Q), 2,000 MW (3Q), 2,000 MW (4Q)
As of June 30, 2013 there were 1,280.7 MW under construction across 13 projects in eight states.
Recent utility statements on why they are interested in adding wind power to their portfolios...

...For fuel diversity

“Adding additional wind energy to our generation mix underscores our commitment to a diverse portfolio that offers clean, safe, reliable, sustainable and low-cost electricity for years to come.”
- Paul Bowers, president & CEO of Georgia Power after signing 2 PPAs for Georgia Power’s first wind contracts. April 23, 2013

...As a hedge against volatile fuel prices

“The latest addition of 150 megawatts of low-cost wind energy provides AECC with a hedge against fluctuating natural gas energy prices [...] We will continue to pursue energy options that allow AECC’s member cooperatives to provide reliable electricity at the lowest possible cost.”
- Duane Highley, president & CEO of Arkansas Electric Cooperative Corporation after signing a 150 MW contract July 22, 2013

...To save consumers money

“We started shopping for more wind energy in March after seeing some very good prices on the market [...] We are making these acquisitions purely on economics and the savings we can deliver to our customers.”
- Riley Hill, president & CEO of Xcel Energy’s Southwestern Public Service Company after announcing on July 10, 2013 nearly 700 MW that will save customers more than $590 million in fuel costs over 20 years

...For cost competitiveness

“Wind prices are extremely competitive right now, offering lower costs than other possible resources, like natural gas plants. These projects offer a great hedge against rising and often volatile fuel prices.”
- David Sparby, president & CEO of Xcel Energy’s Northern States Power announcing 600 MW of new wind power contracts on July 16, 2013
For more information on AWEA market analysis, please log-in to the AWEA member center in the upper-right hand corner of www.awea.org where you can access older versions of the Quarterly Market Reports and see the latest Annual Market Report.

For a spreadsheet with underlying data or with any corrections, please contact Emily Williams at ewilliams@awea.org