A Critical Analysis of the Competitiveness of Germany’s Onshore Wind Industry in the Wake of Chinese Competition
Abstract

This paper contributes to the field of energy policy by studying two questions of high theoretical and practical relevance. Firstly, it asks how competitive the German onshore wind industry is compared to China’s. Secondly, it investigates if an equally drastic value chain relocation to China as occurred with Germany’s solar PV industry is likely. Based on a comprehensive study of the German market for onshore wind, competitiveness indicators for the international market and an expert interview, it arrives at three key findings: Germany’s industry has lost competitiveness in recent years, supply chain shifts to Asia and specifically China are in full swing and Chinese manufacturers are poised to enter the German market. However, the German onshore wind industry still is competitive and has a strong basis in the domestic market and with the right political framework, could brace the storm.