

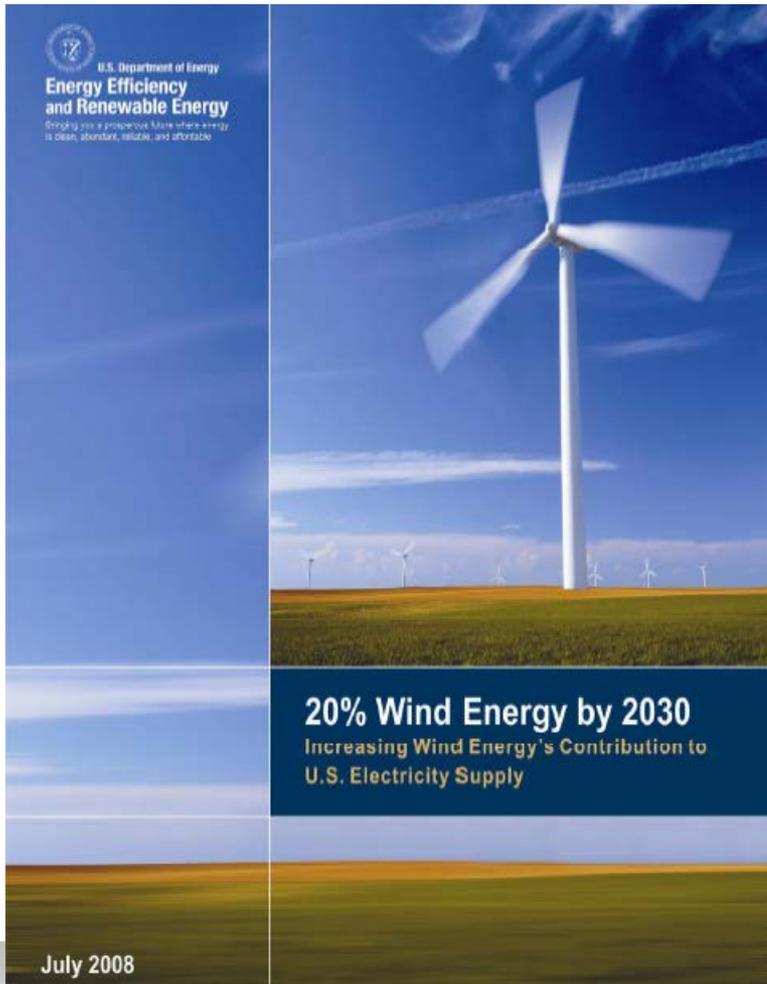
Nebraska Wind & Solar Conference:

US Wind Outlook

October 29, 2014



2008 DOE Report

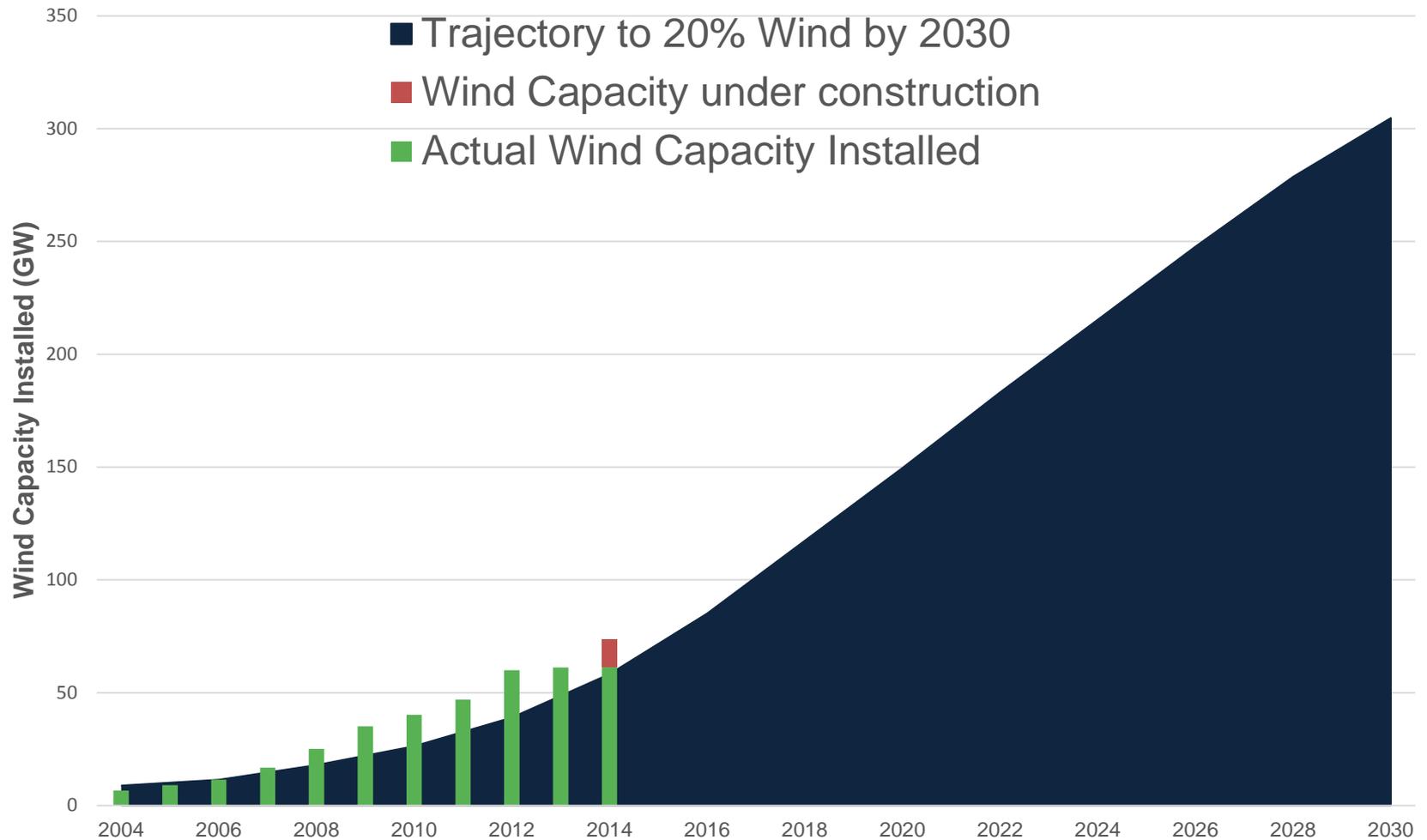


2014 DOE Wind Vision Update



- Preliminary Report
- Now under peer review

Tracking the wind industry's progress



Source: DOE 20% Wind Energy by 2030 and AWEA Market Data

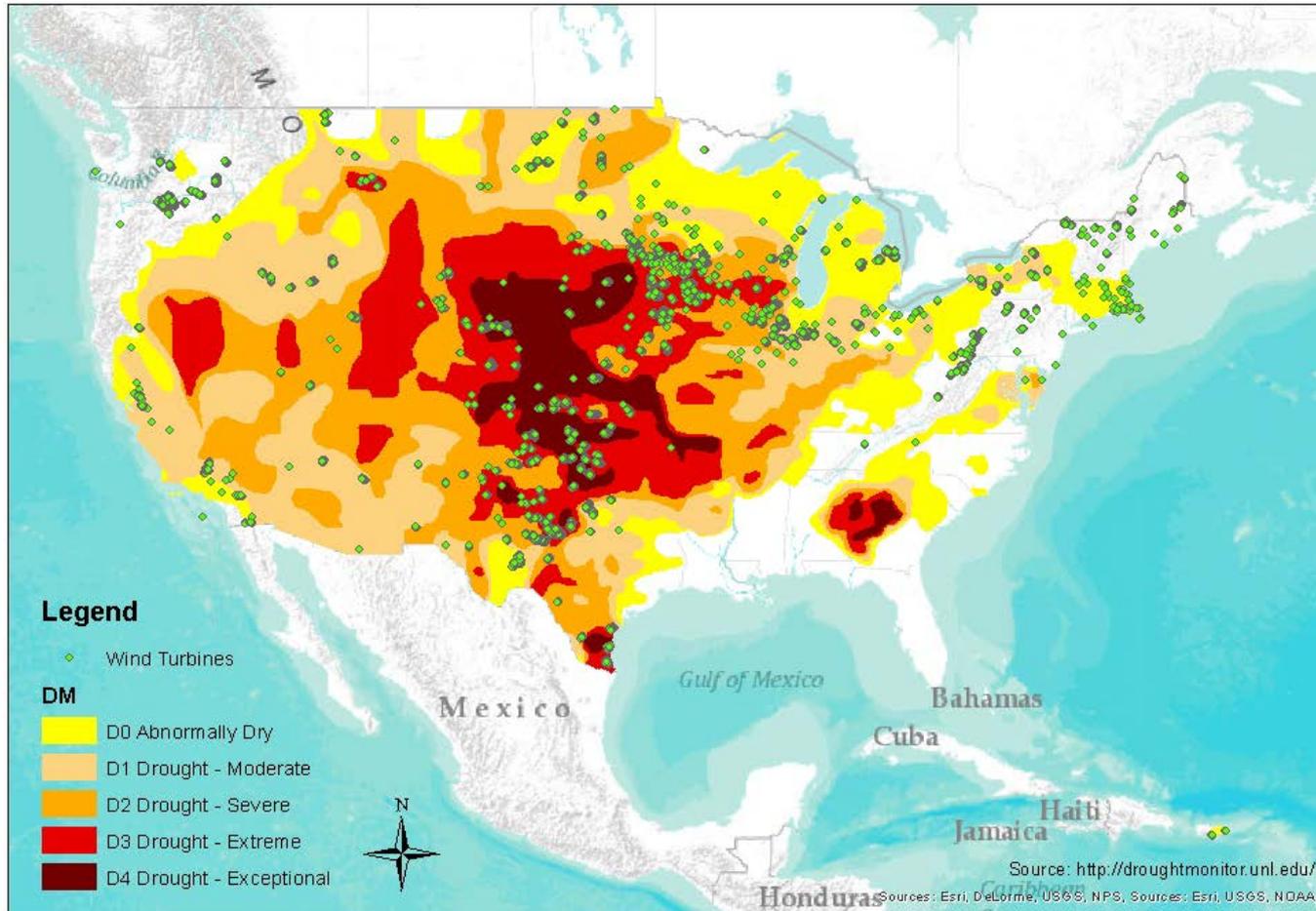


Preliminary Conclusions

- Vision is Achievable
- Benefits:
 - *Reduces* Consumer rates over long term
 - Creates jobs
 - Reduces water stress
 - Reduces carbon emissions
 - (AWEA: Reduces fuel price volatility)

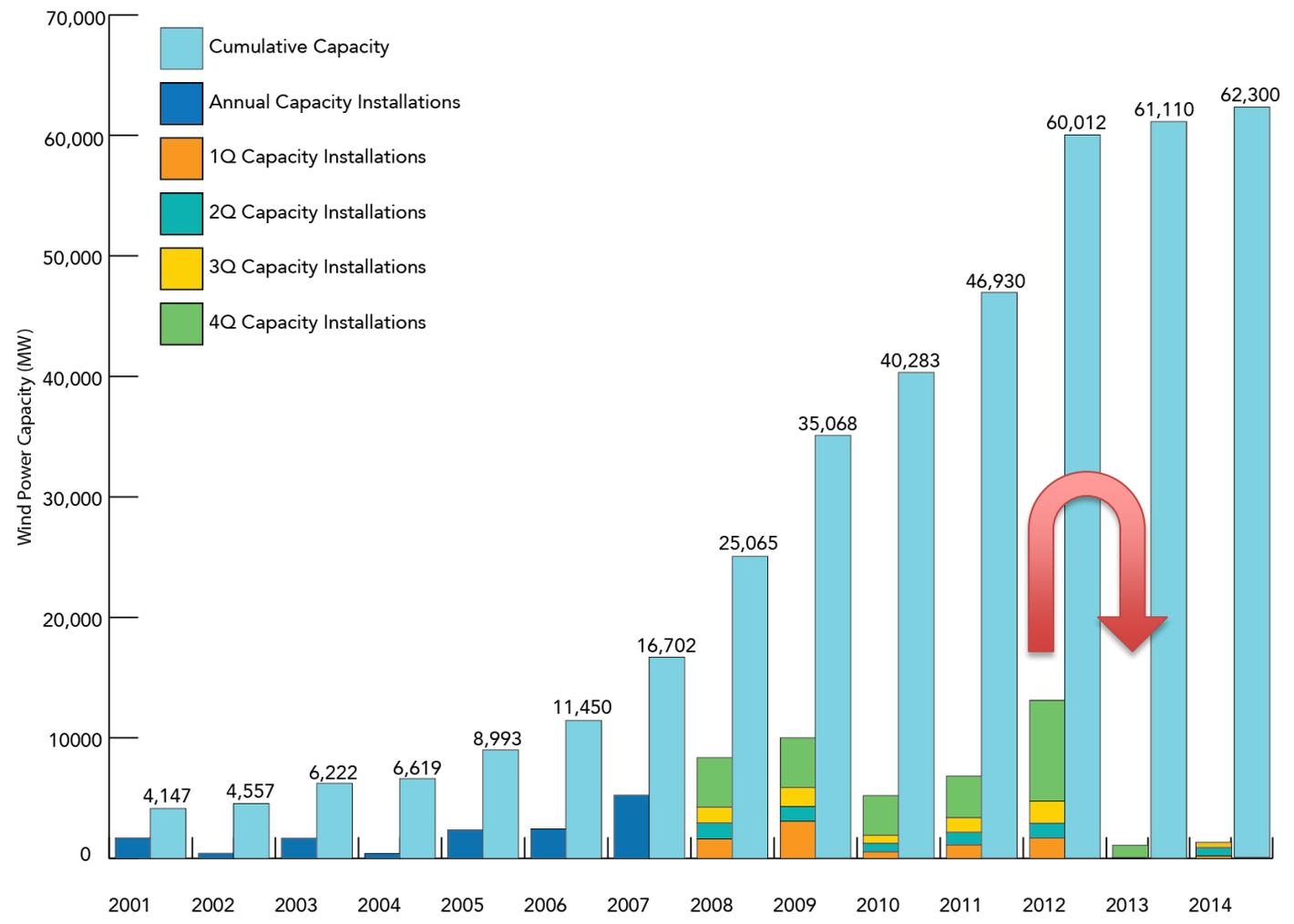
Water Savings Benefits

United States September 2012 Drought Conditions

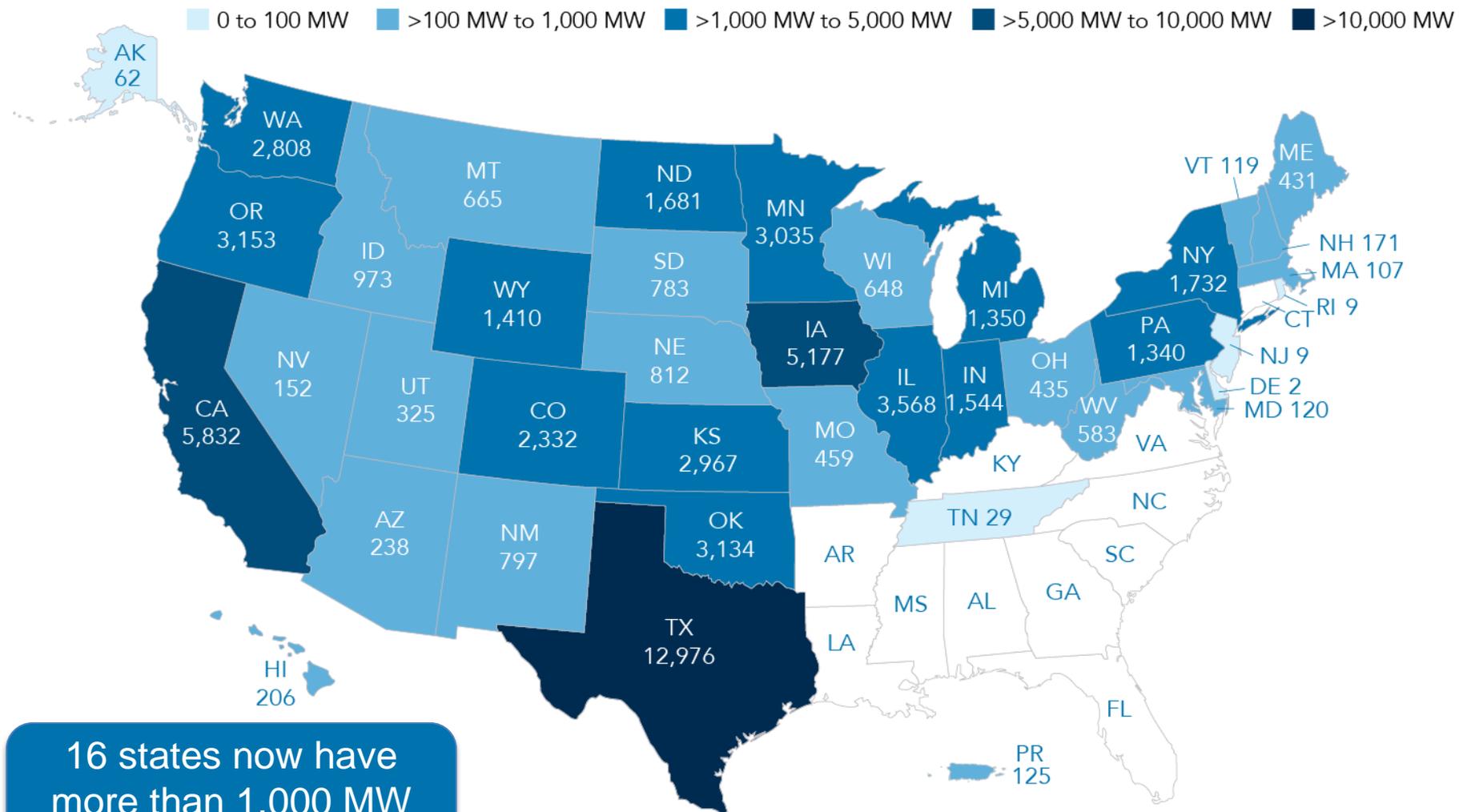


U.S. Annual and Cumulative Wind Power Capacity Growth

With the completion of 419 MW during the third quarter, the U.S. wind industry now has 62,300 MW of installed capacity

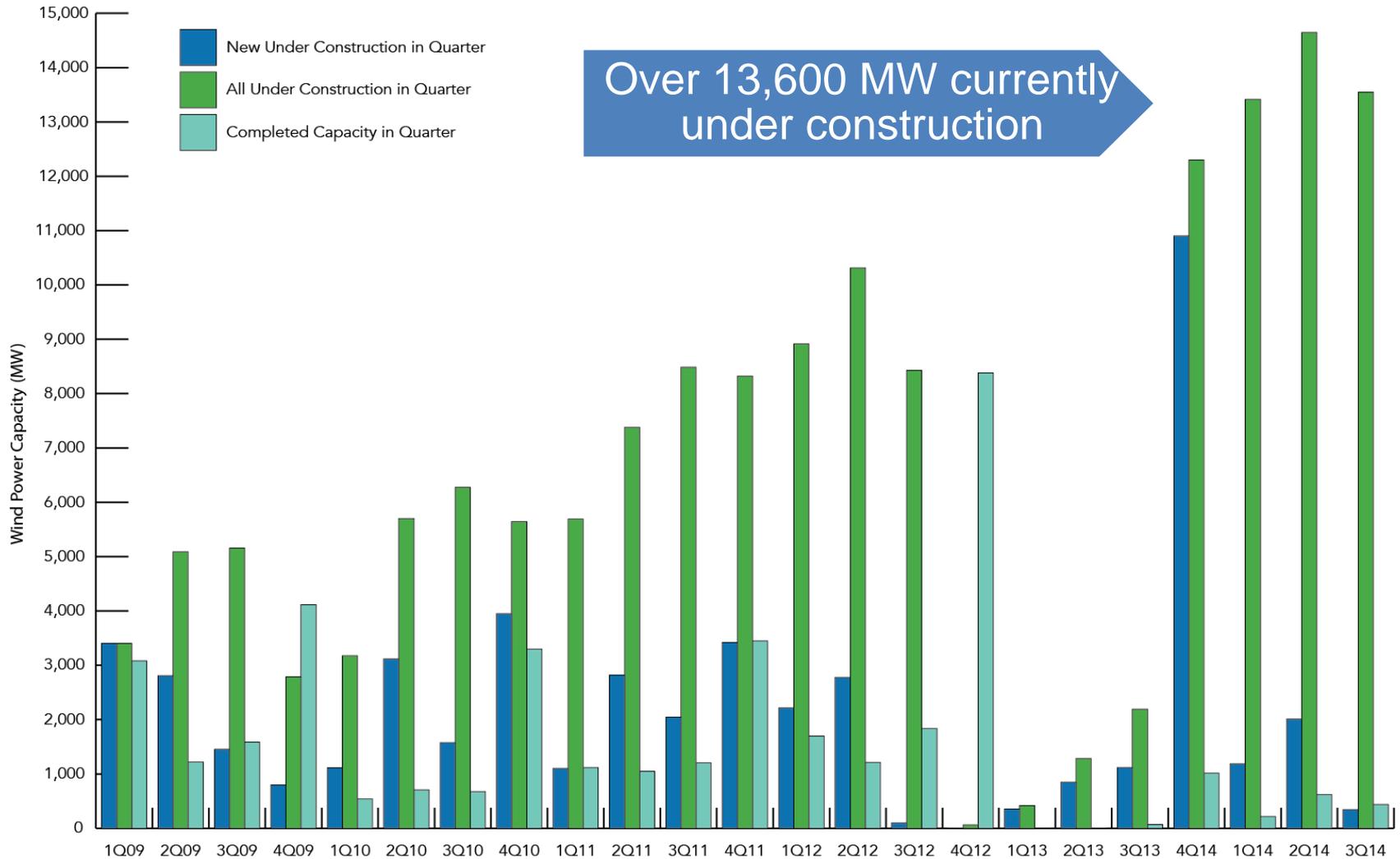


Map of Wind Power Capacity Online



16 states now have more than 1,000 MW of installed wind

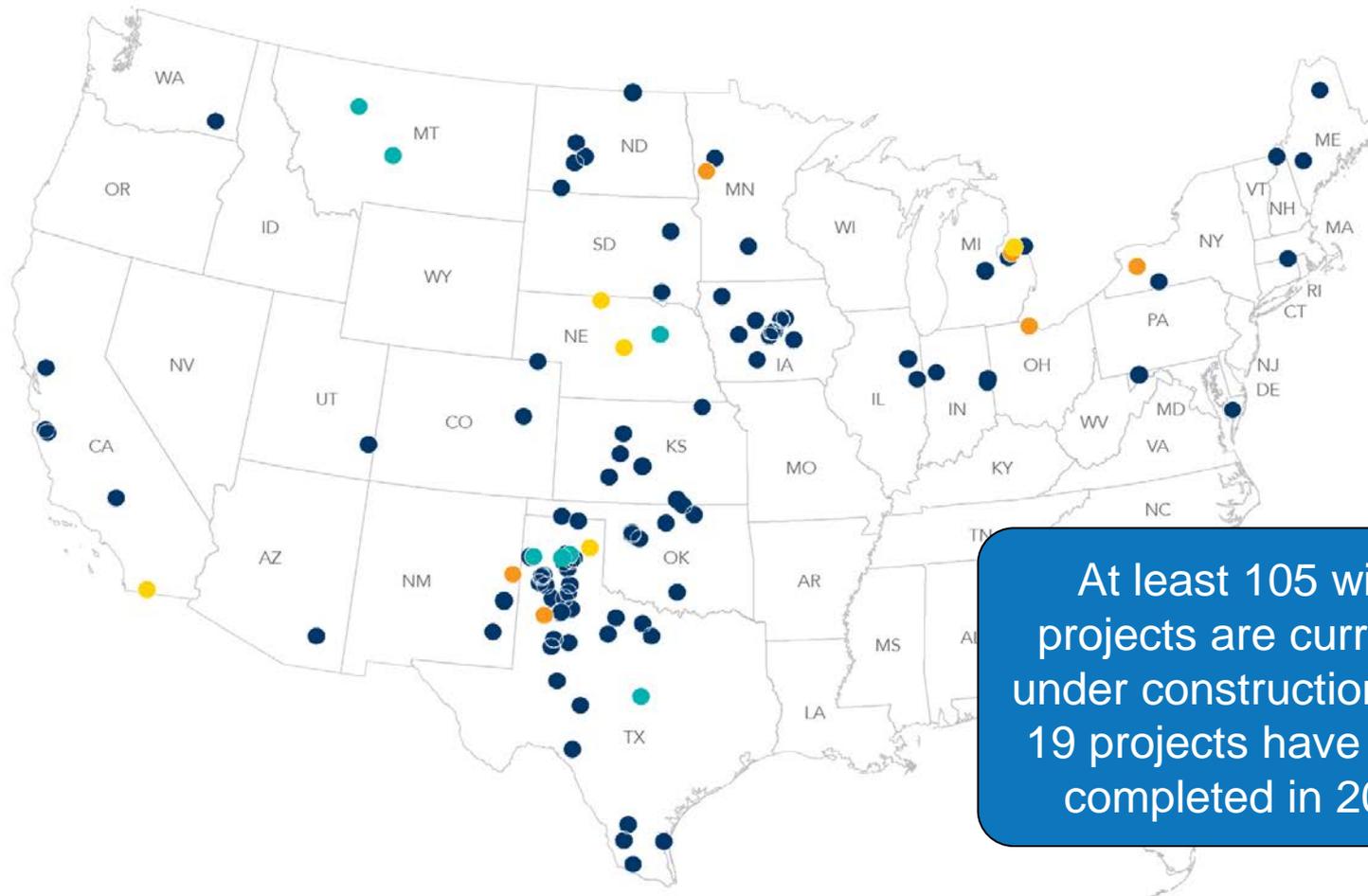
Wind Power Capacity Under Construction



Over 13,600 MW currently under construction

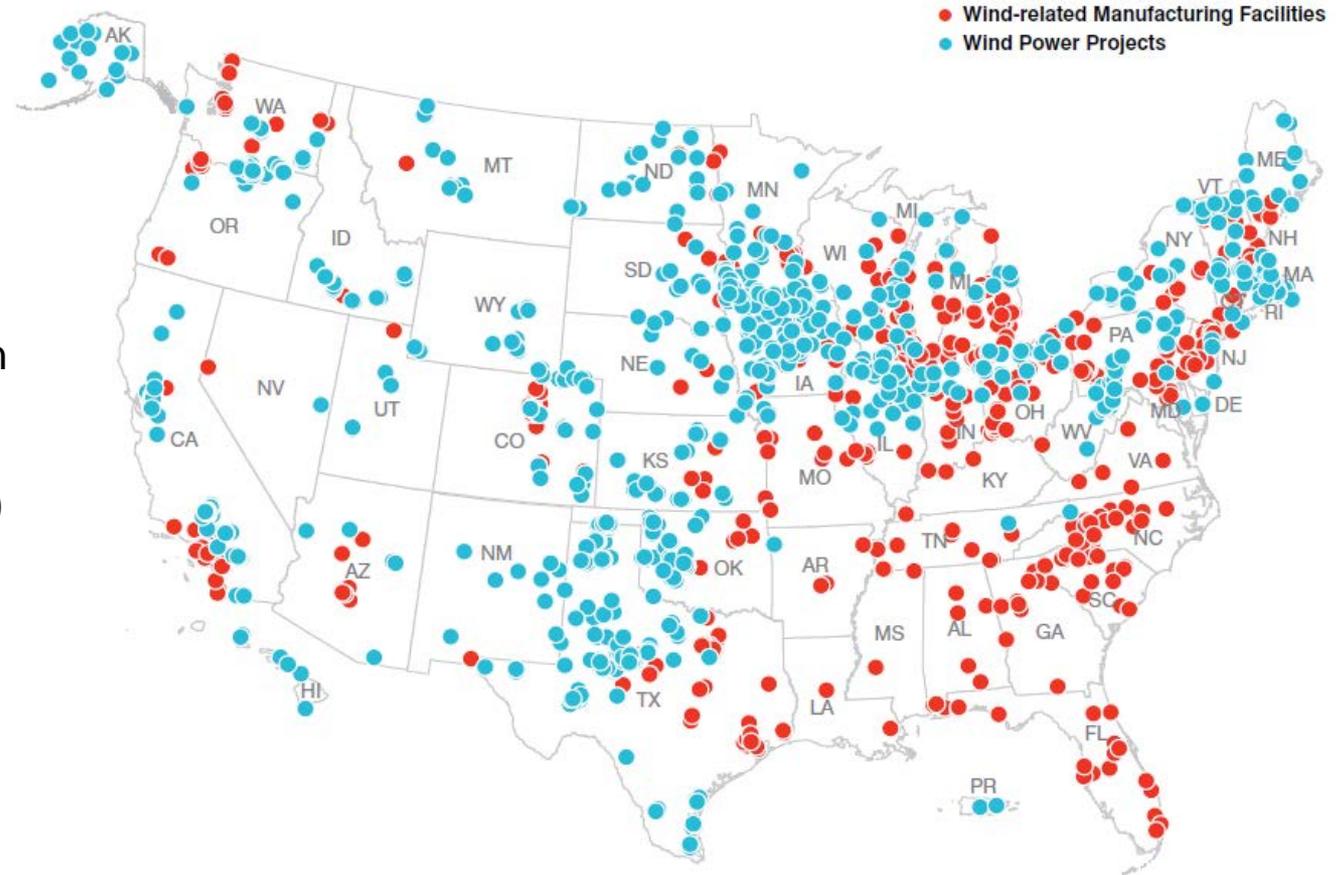
Map of 2014 Projects Online and Under Construction

● Projects Online 1Q 2014 ● Projects Online 2Q 2014 ● Projects Online 3Q 2014 ● Projects Under Construction as of 3Q 2014

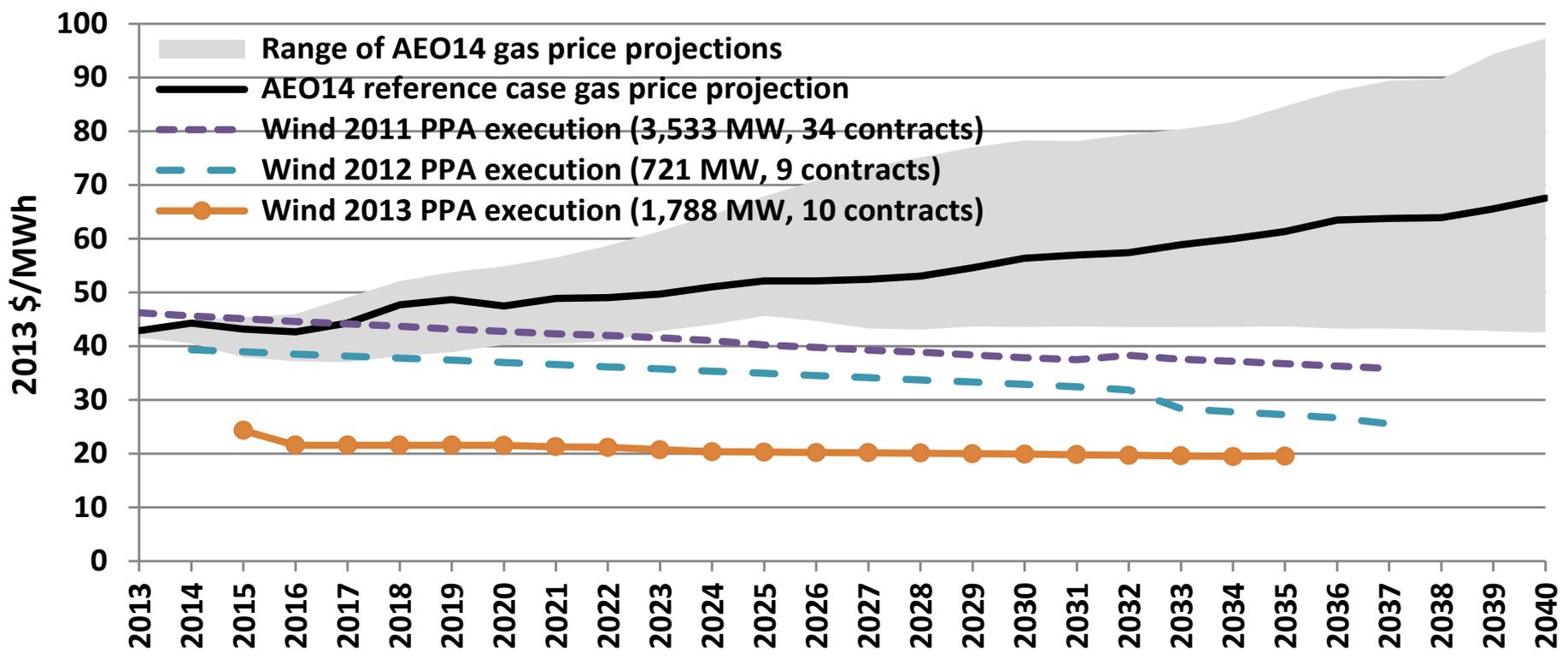


Manufacturing Facilities and Projects

- 61,108 MW of wind energy capacity represents
- Over 45,000 wind turbines, power equivalent of 15 million homes, and
- 900 projects across 39 states



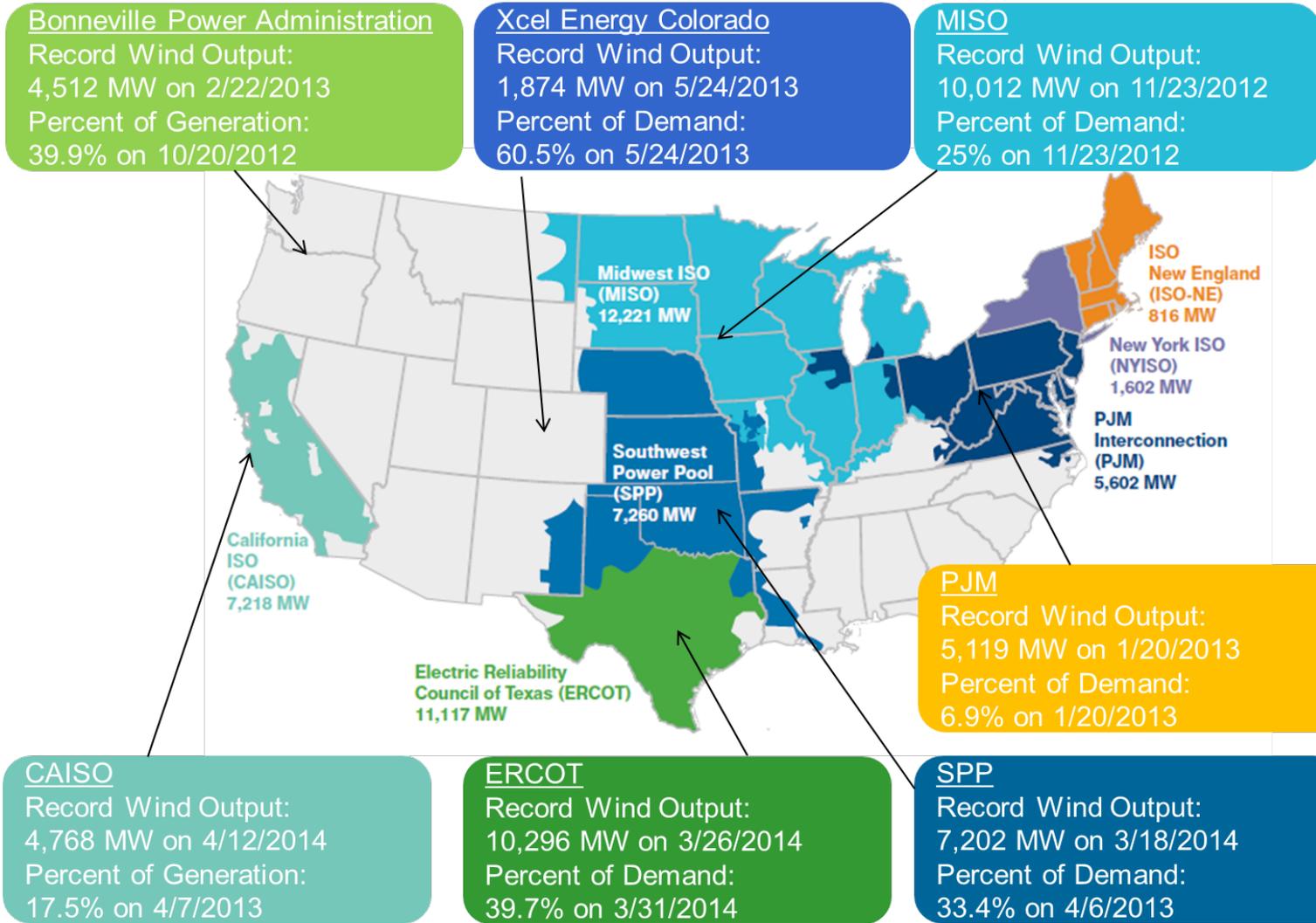
Wind Prices (w/ PTC) Are Hard to Beat: Below the Current & Expected Future Cost of Burning Fuel in Natural Gas Plants



Source: A Preview of the 2013 Wind Technologies Market Report, LBNL

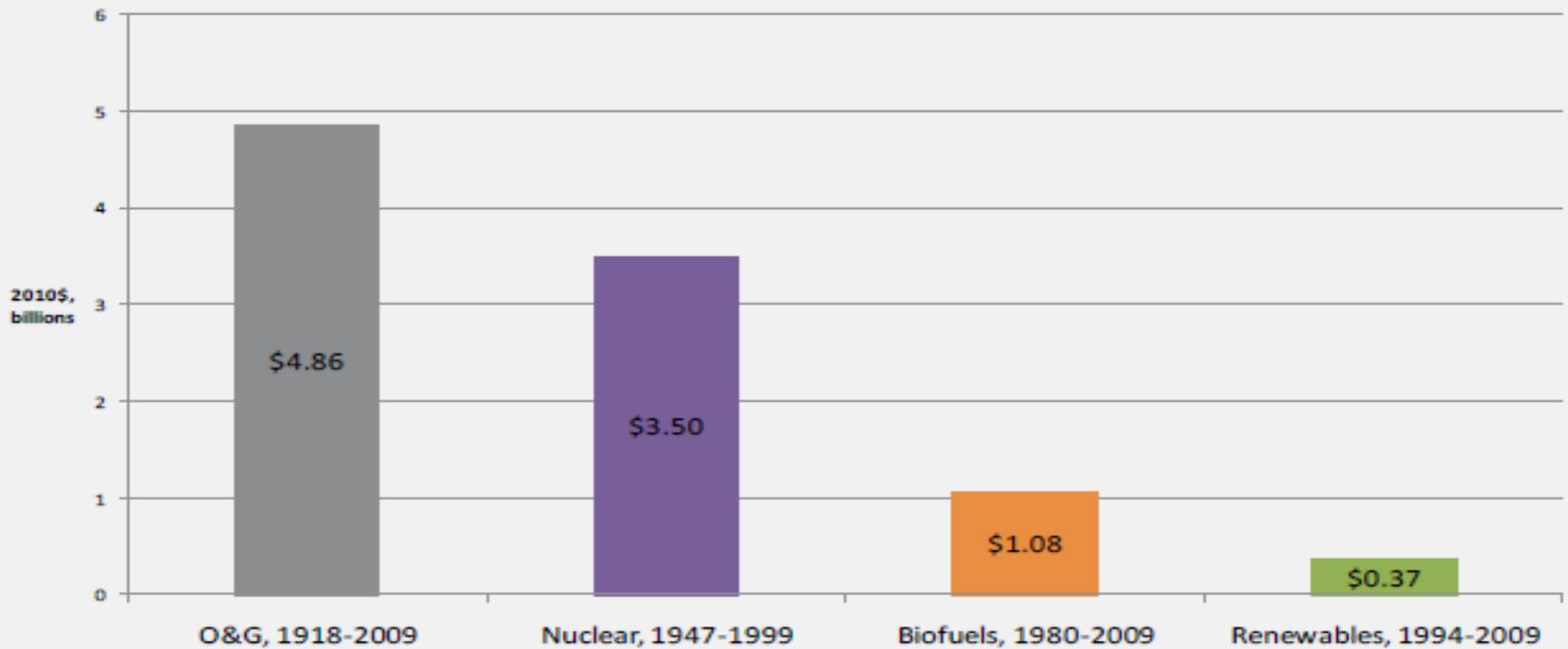


Wind Energy Records, by Region



Fuel Subsidies

**Historical Average of Annual Energy Subsidies:
A Century of Federal Support**



Opportunities & Challenges

- PTC/ITC Extension
- EPA Clean Power Plant Rule
- Siting & Wildlife
- Transmission

Upcoming Events

AWEA Wind Energy Fall Symposium

November 18-20, 2014 | San Diego, CA | www.awea.org/symposium

AWEA Wind Resource & Project Energy Assessment Seminar

December 2-3, 2014 | Orlando, FL | www.awea.org/wra

AWEA Wind Project O&M and Safety Seminar

February 2-3, 2015 | San Diego, CA | www.awea.org/oms

AWEA Wind Project Siting Seminar

March 10-11, 2015 | Austin, TX | www.awea.org/siting

AWEA WINDPOWER

May 18-21, 2015 | Orlando, FL | www.windpowerexpo.org



AWEA State Wind Energy Forum - Michigan

January 20, 2015 | Lansing, MI | www.awea.org/michigan