Wind Turbine Orders Monitoring

Q1 2025 statistics

Wind EUROPE

windeurope.org

May 2025

Scope

This report summarises wind turbine orders that were placed between 1 January 2025 and 31 March 2025.

WindEurope tracks announced wind turbine orders on the basis of publicly available information on commercial transactions and future deals, categorising them into firm orders and conditional orders.

Orders of Enercon turbines are not included because they are not publicly available.

For details of the methodology for estimating undisclosed orders see the Methodology slide at the end of the deck.

Analysis contained in this report relates to firm and disclosed orders only unless stated otherwise.

Neither WindEurope nor its members, nor their related entities are, by means of this publication, rendering professional advice or services. Neither WindEurope nor its members shall be responsible for any loss whatsoever sustained by any person who relies on this publication.

TEXT AND ANALYSIS:

WindEurope Market Intelligence

Areta Jati

MORE INFORMATION:

policy@windeurope.org

+32 2 213 18 11

Content

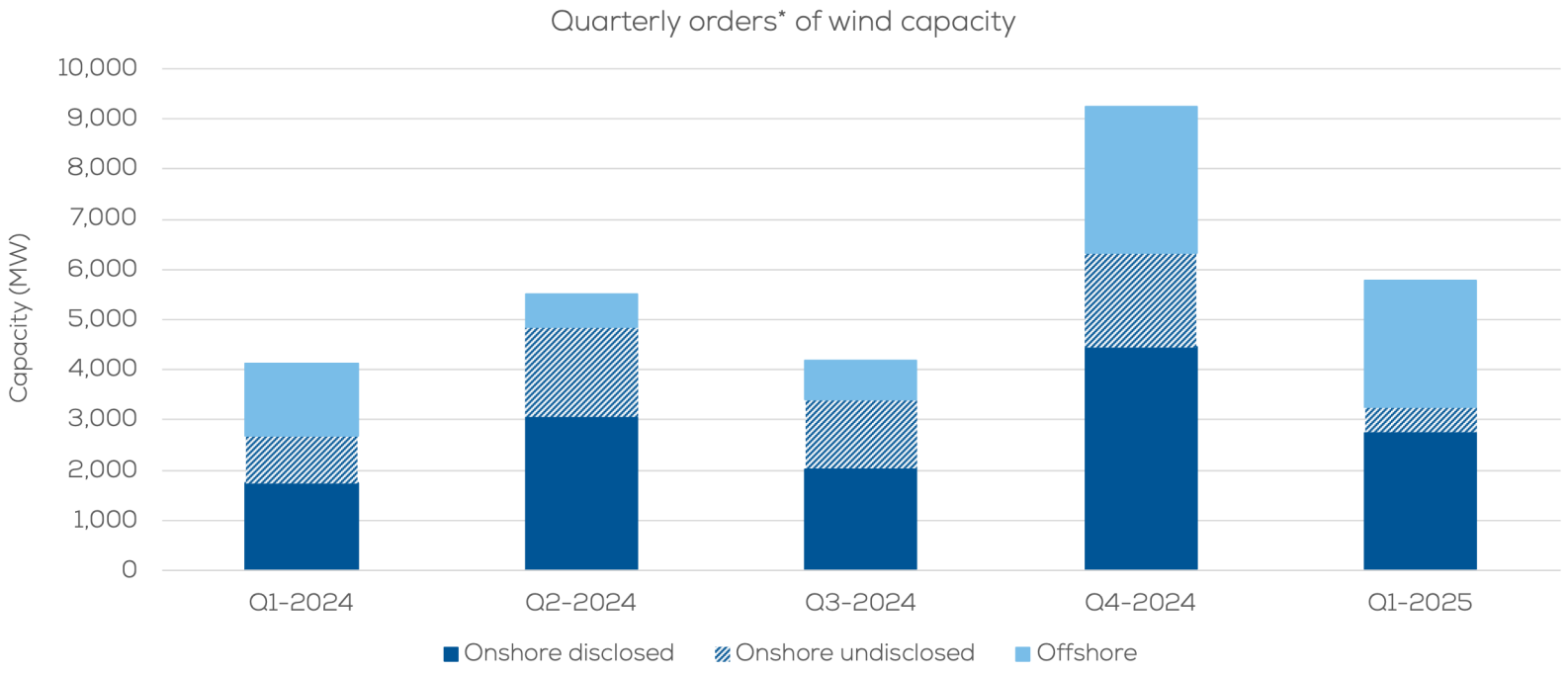
Wind EUROPE

Q1 2025 HIGHLIGHTS

- There were orders for a total of 5.8 GW (of which 0.5 GW undisclosed) across 10 countries. There were orders from two offshore wind turbines in Poland (1.5 GW) and Germany (1.0 GW).
- The total ordered capacity was down 38% on Q4 2024 but 40% up year-on-year.
- Germany led ordered capacity with 1.8 GW, followed by Poland (1.5 GW) and Türkiye (805 MW).
- Nordex received 38% of all the disclosed ordered capacity, closely followed by Vestas (33%), Siemens Energy (28%), and GE Vernova (1%).
- 98% of the disclosed ordered capacity in Q1 2025 reported the inclusion of an Operation & Maintenance (O&M) contract.
- We tracked firm orders for 49 wind farms in Q1 2025.

Orders in Q1 2025 were 38% down on Q4 2024 with 5.8 GW but 40% up year-on-year.

Onshore + Offshore

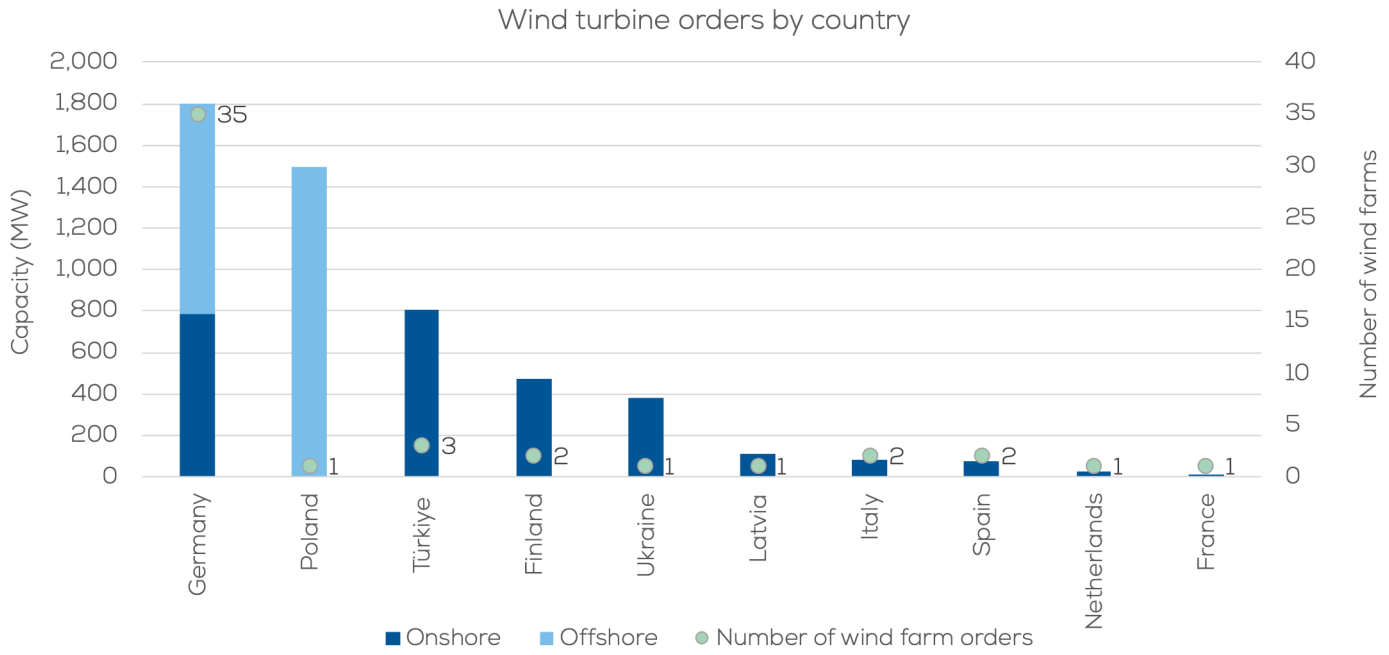


*See Methodology (slide 26) for an explanation of undisclosed orders

Source: WindEurope

Germany led ordered capacity with 1.8 GW, followed by Poland (1.5 GW) and Türkiye (805 MW).

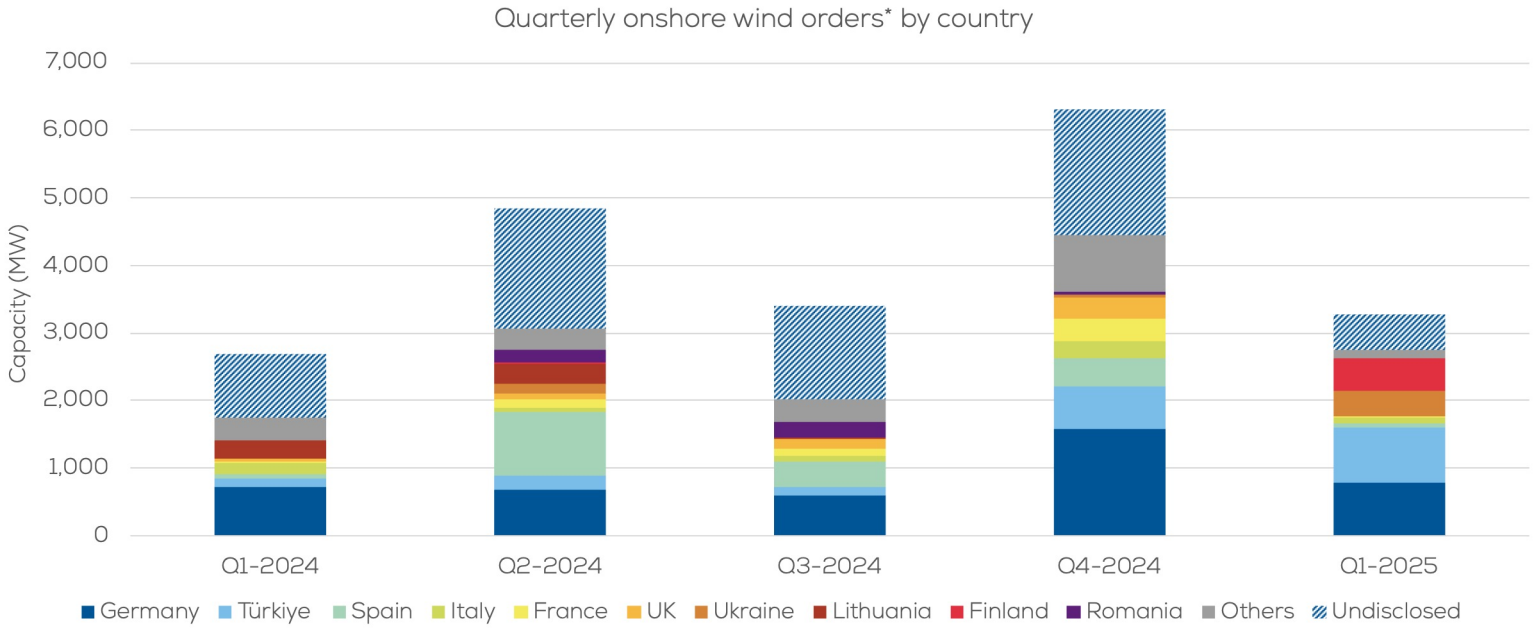
Onshore + Offshore



Source: WindEurope

Onshore orders in Q1 2025 were down 48% on Q4 2024 and 24% on the average of the previous four quarters.

Onshore

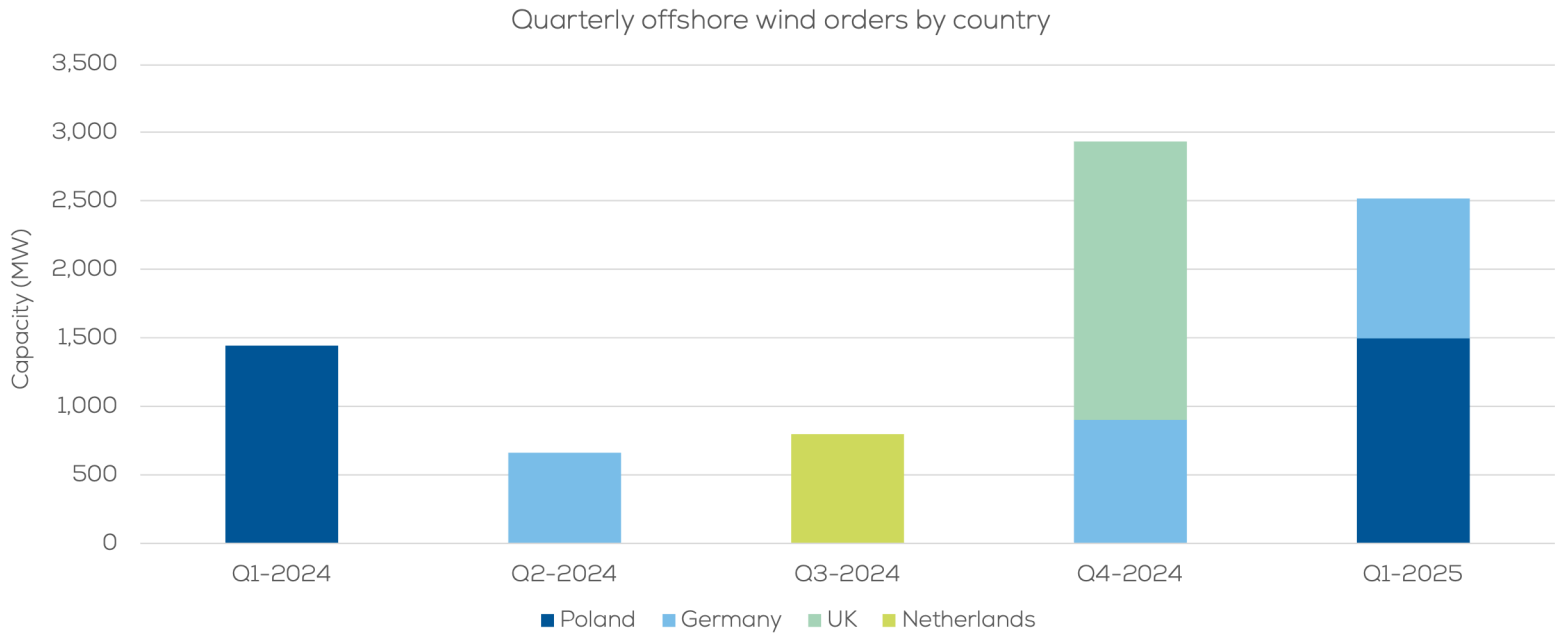


*See Methodology (slide 26) for an explanation of undisclosed orders

Source: WindEurope

In Q1 2025 there were two orders for offshore wind turbines, one from Poland and the other from Germany.

Offshore

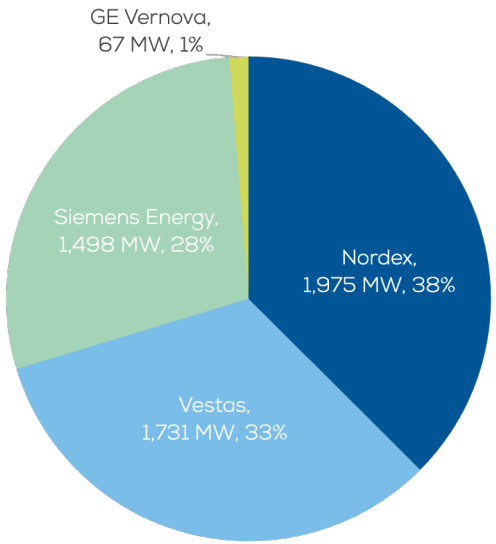


Source: WindEurope

Nordex had the highest share of disclosed ordered capacity in Q1 2025, closely followed by Vestas.

Onshore + Offshore

Wind turbine orders by OEM



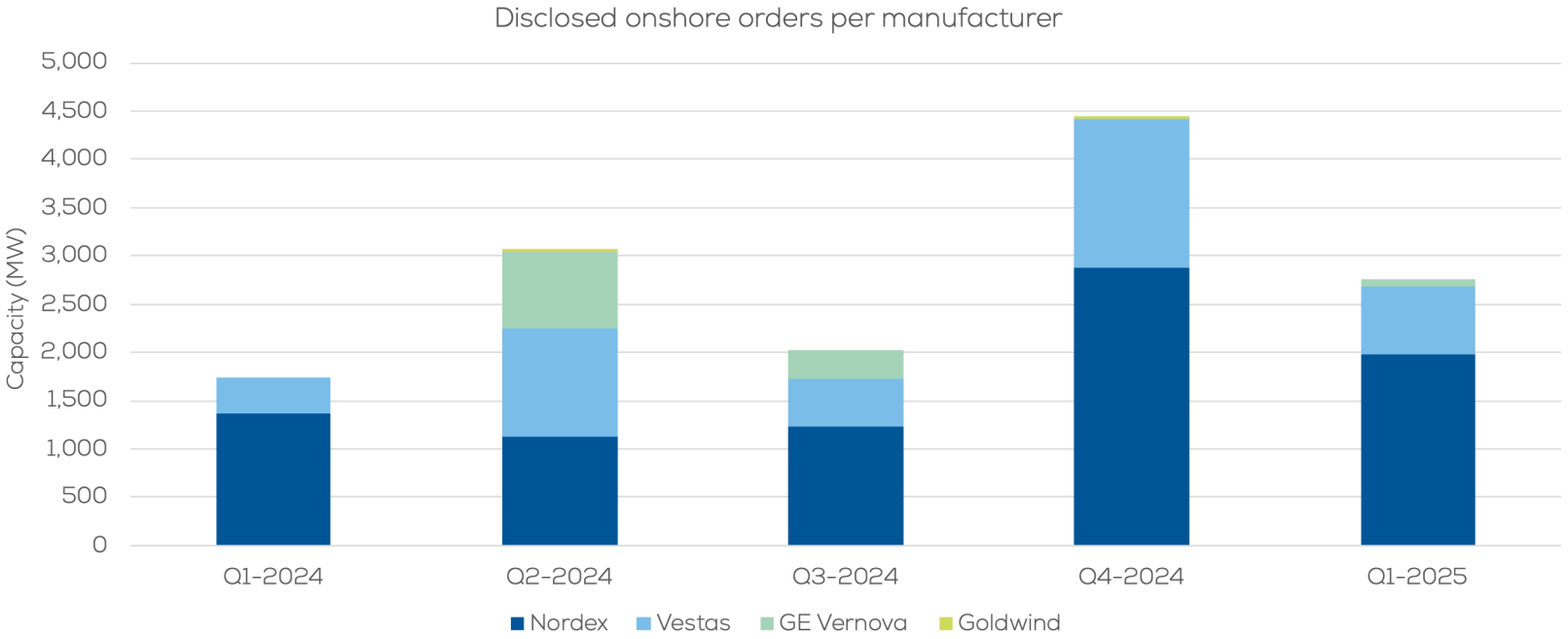
Top 5 ordered turbines

Turbine model	Ordered capacity	Number of turbines	Power rating configuration	
SG 14-222	1,498 MW	107	14.0 MW	107
N163/6.X MW	1,103 MW	158	6.8 MW	14
			7.0 MW	144
V236-15.0 MW	1,020 MW	68	15.0 MW	68
V162-6.2 MW	525 MW	87	5.6 MW	2
			6.0 MW	65
			6.2 MW	20
N175/6.X	508 MW	75	6.5 MW	16
			6.8 MW	5
			6.9 MW	54

Source: WindEurope

In Q1 2025 three OEMs disclosed onshore orders totalling 2.8 GW, 38% less than in the previous quarter.

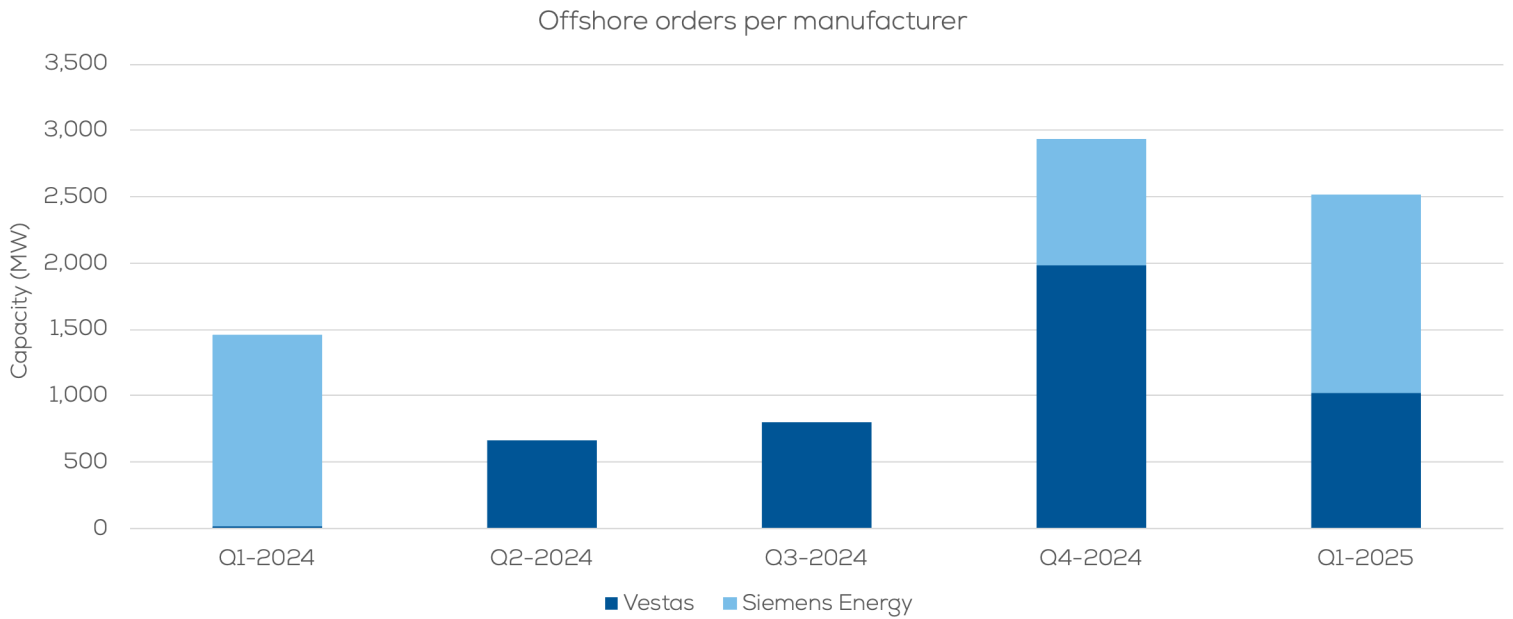
Onshore



Source: WindEurope

In Q1 2025 two OEMs disclosed firm orders for offshore wind turbines totalling 2.5 GW, down 14% on Q4 2024.

Offshore



Source: WindEurope

The top five disclosed buyers accounted for 67% of the Q1 2025 disclosed ordered capacity.

Onshore + Offshore

Top 5 buyers of disclosed orders

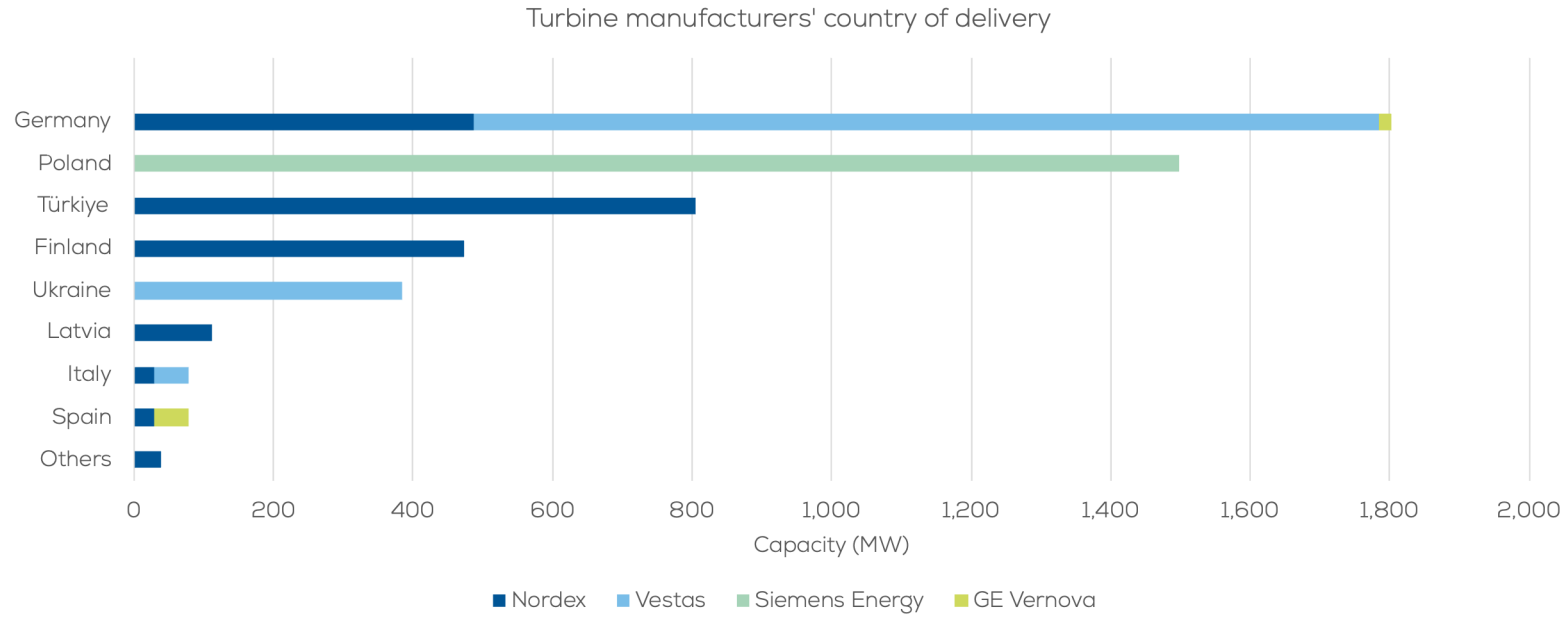
Buyer	Ordered Capacity
PGE, Ørsted	1,498 MW
Vattenfall	1,020 MW
OX2	474 MW
DTEK	384 MW
wpd	154 MW

Offshore Onshore

Source: WindEurope

In Q1 2025 Nordex disclosed orders in eight countries, Vestas in three, GE Vernova in two, and Siemens Energy in one.

Onshore + Offshore



Source: WindEurope

90% of ordered onshore wind turbines had a power rating above 5 MW; all offshore turbines ordered were above 14 MW.

Onshore + Offshore

	2 to 4 MW	4 to 5 MW	5 to 6 MW	6 to 7 MW	7 to 8 MW	10 to 16 MW
Germany	6 turbines	15 turbines	51 turbines	48 turbines	14 turbines	68 turbines
Poland						107 turbines
Türkiye					115 turbines	
Finland				70 turbines		
Ukraine				64 turbines		
Latvia					16 turbines	
Italy		11 turbines	5 turbines			
Spain		6 turbines		8 turbines		
Netherlands			4 turbines			
France	4 turbines					
Total	**10 turbines**	**32 turbines**	**60 turbines**	**190 turbines**	**145 turbines**	**175 turbines**

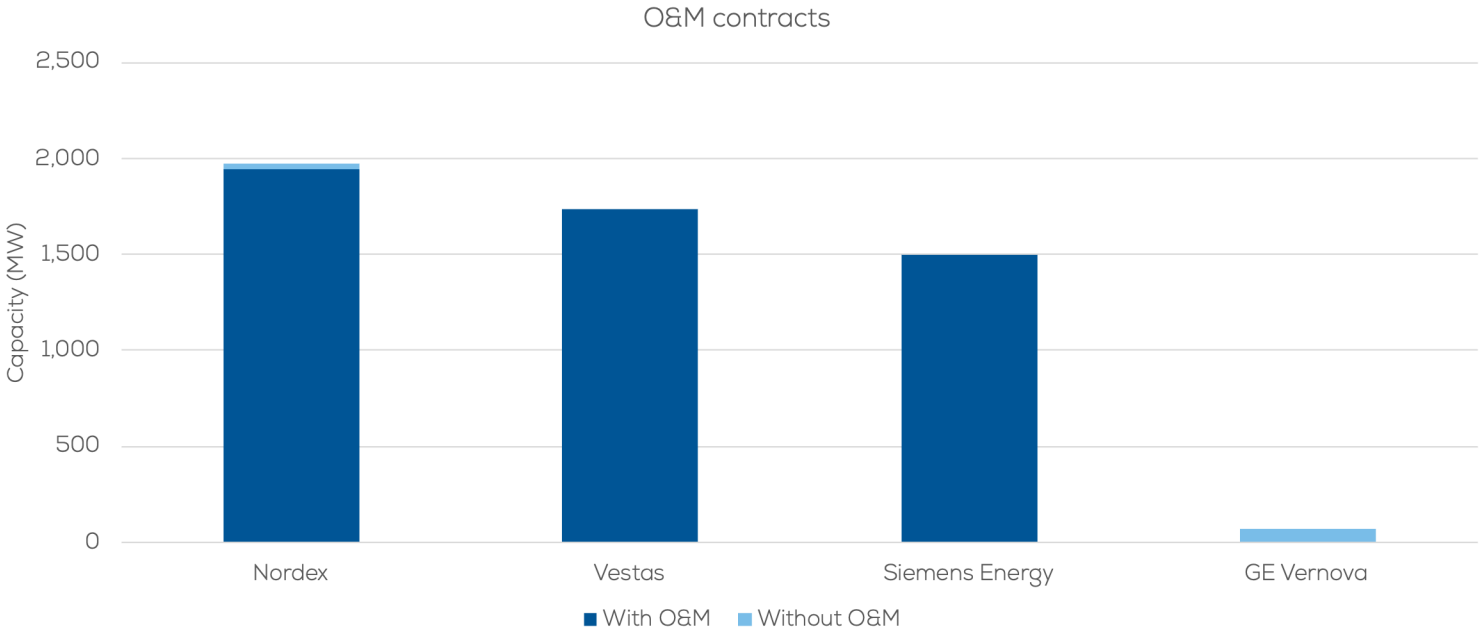
Onshore Offshore

Wind EUROPE

Source: WindEurope

98% of the disclosed ordered capacity reported the inclusion of an Operation & Maintenance (O&M) contract.

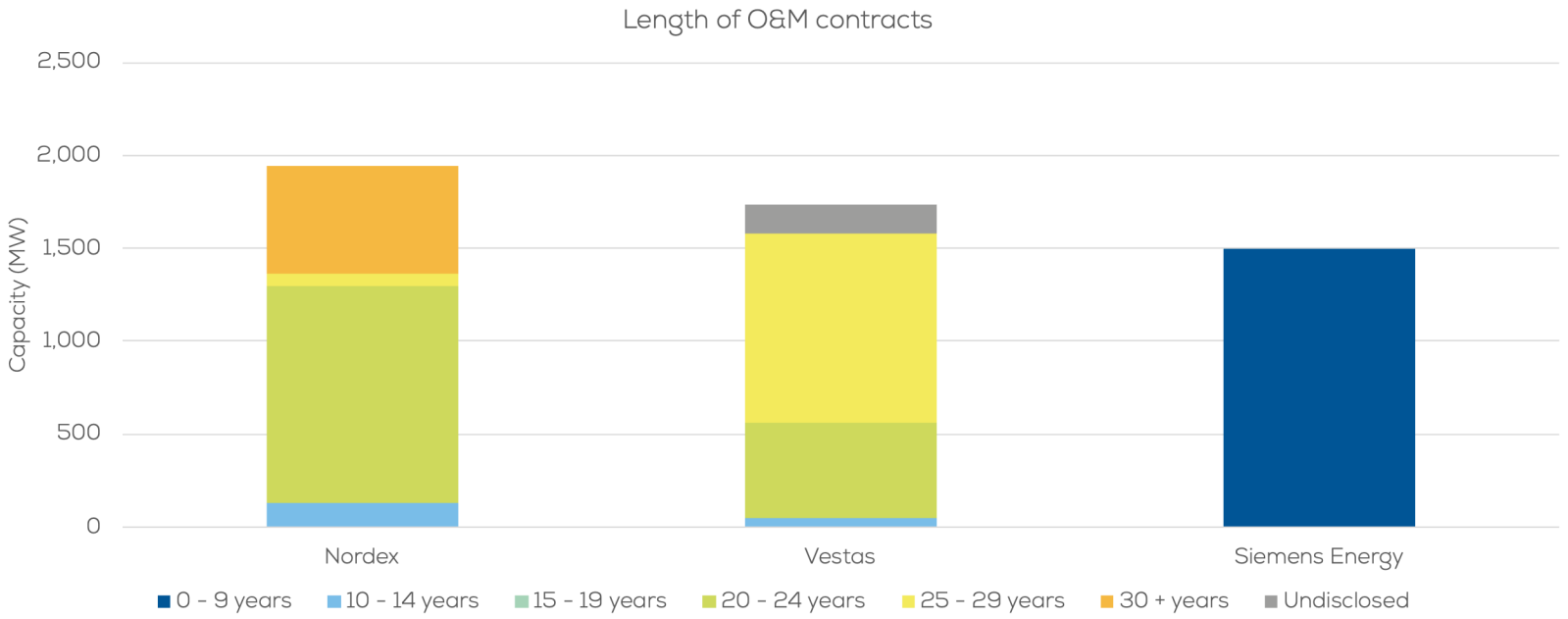
Onshore + Offshore



Source: WindEurope

3.3 GW of disclosed ordered capacity featured an O&M service agreement of at least 20 years.

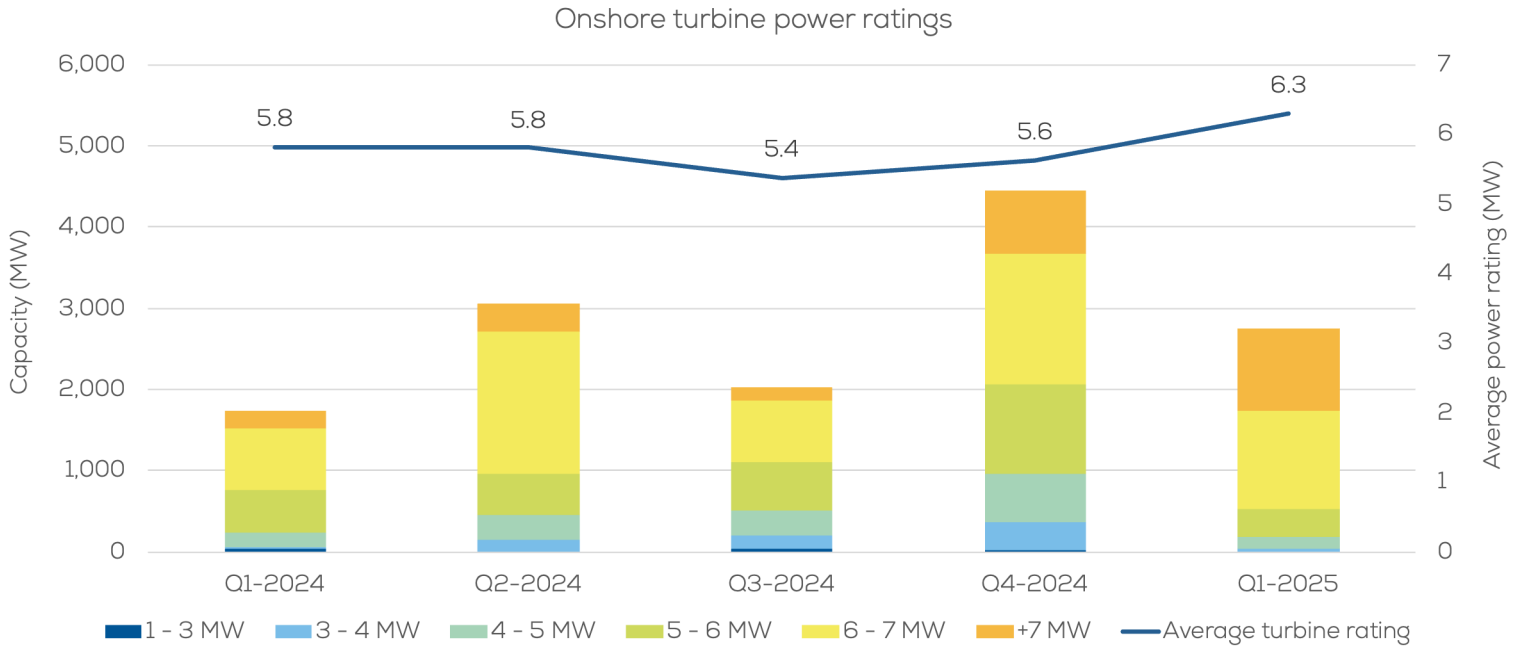
Onshore + Offshore



Source: WindEurope

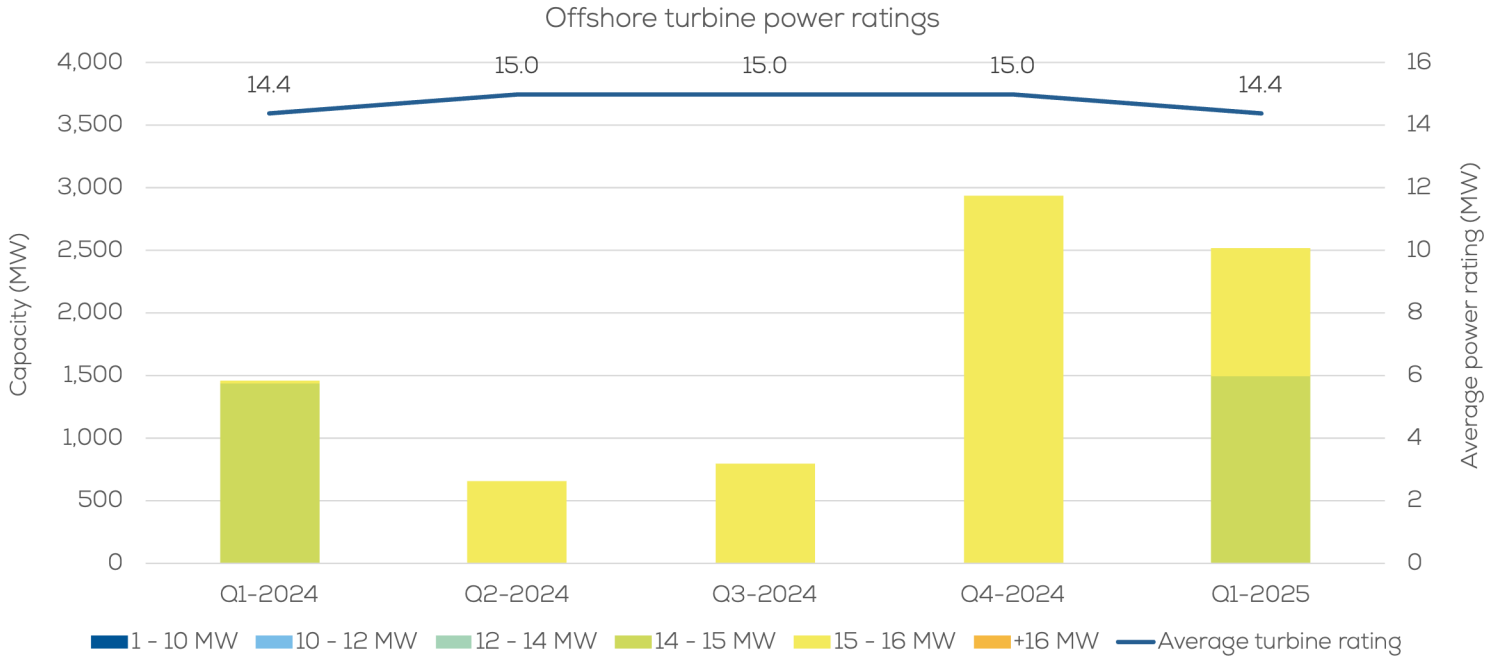
The average onshore turbine size ordered in Q1 2025 was 6.3 MW, setting a new record.

Onshore



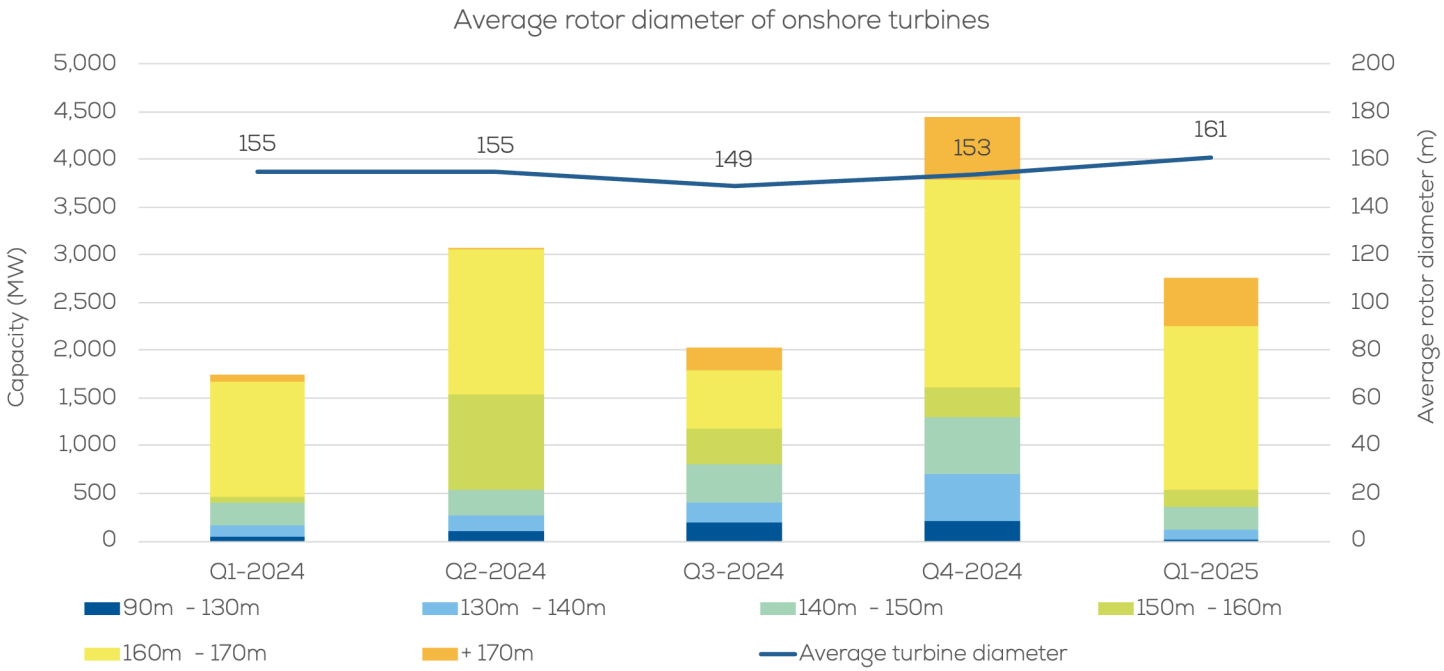
Source: WindEurope

The average offshore turbine size ordered in Q1 2025 was 14.4 MW, slightly down from 15 MW in Q4 2024.



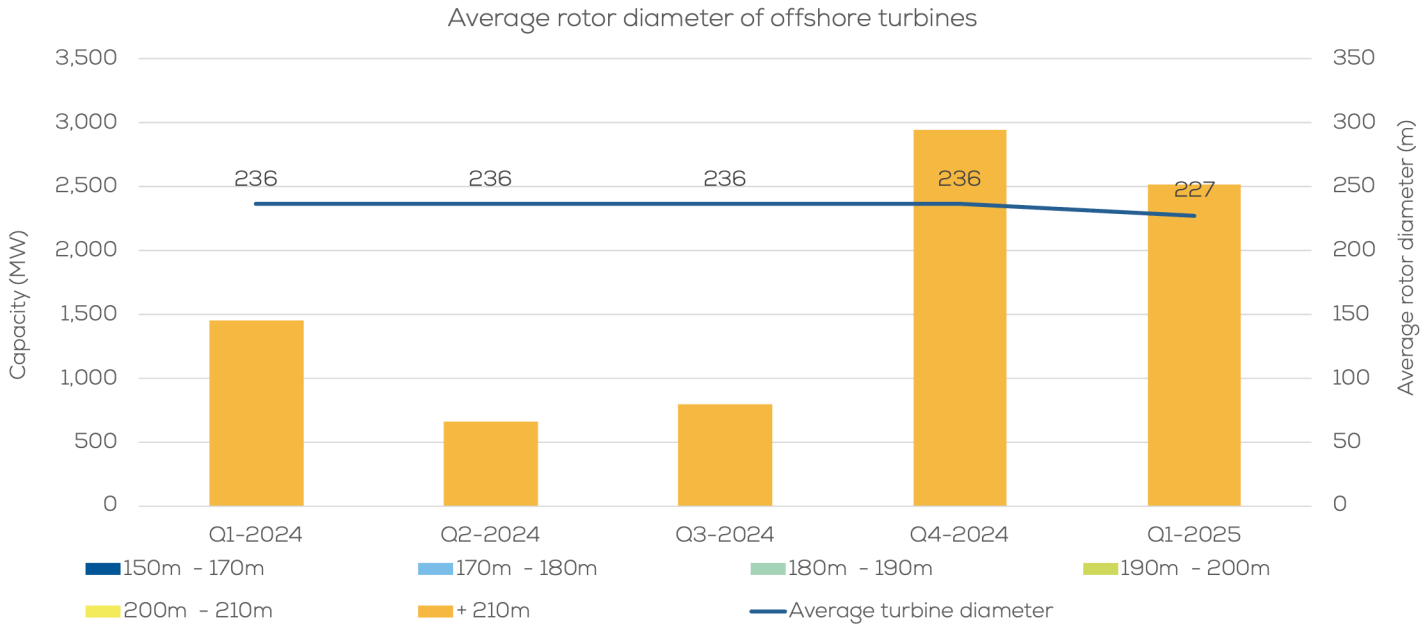
The average rotor diameter of onshore turbine orders in Q1 2025 was 161 metres, setting a new record.

Onshore



Source: WindEurope

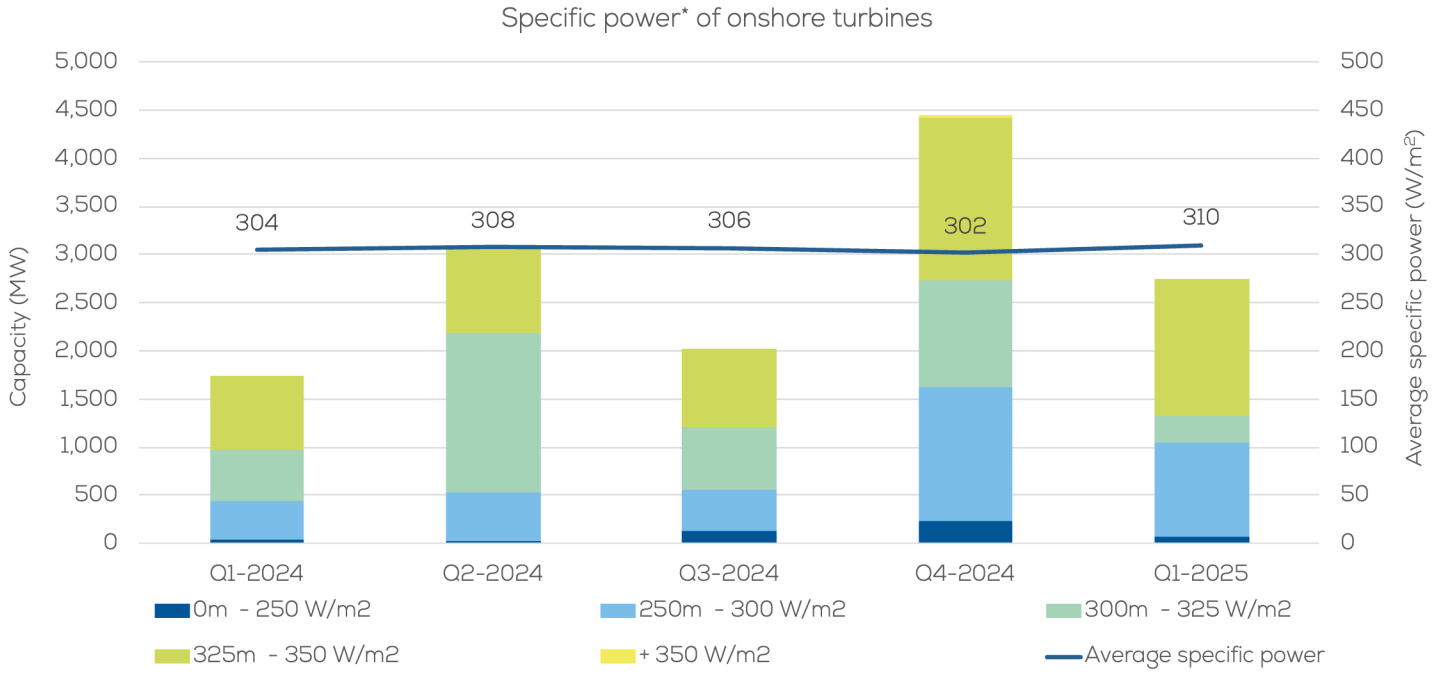
The average rotor diameter of offshore turbine orders in Q1 2025 was 227 metres, down 9 metres from the previous four quarters.



Source: WindEurope

The average specific power of onshore turbines ordered in Q1 2025 was 310 W/m², 3% higher than in Q4 2024.

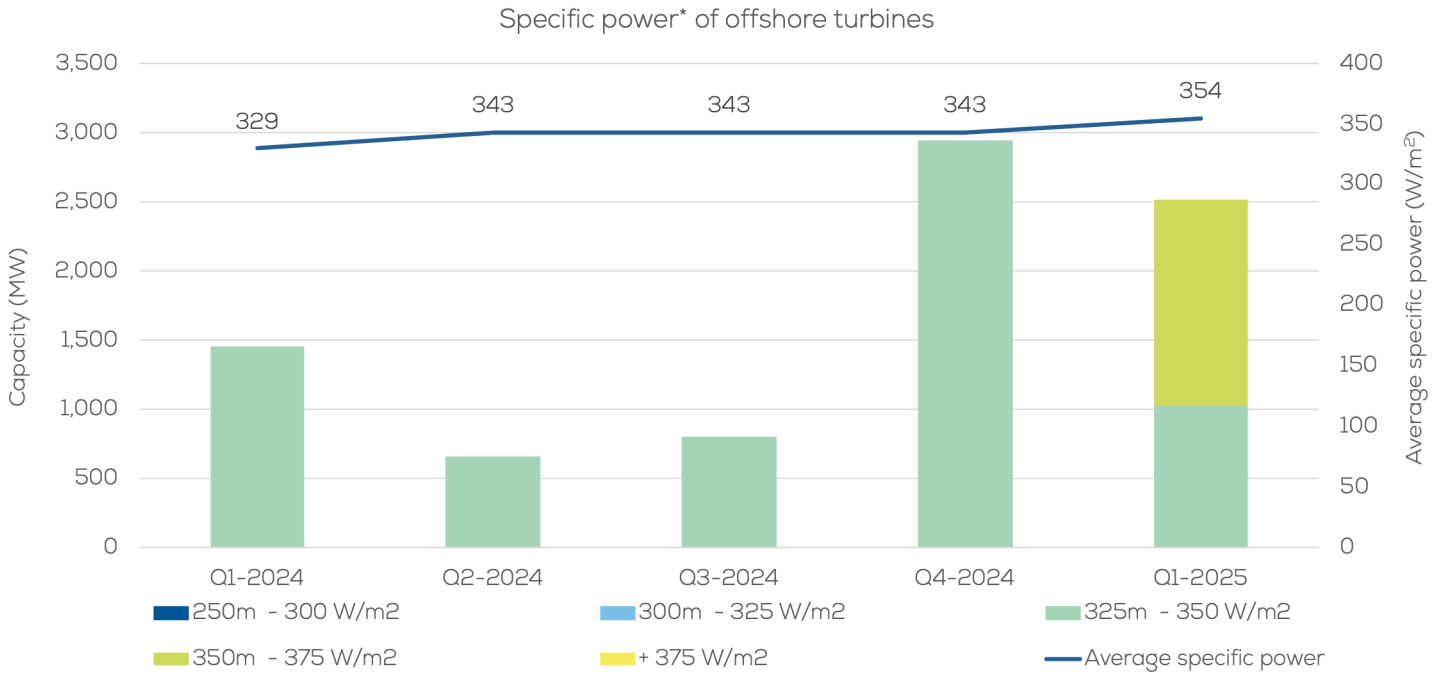
Onshore



*See Annex (slide 25) for an explanation of the concept of specific power

Source: WindEurope

The average specific power of offshore turbines ordered in Q1 2025 was 354 W/m², 3% higher than in Q4 2024.

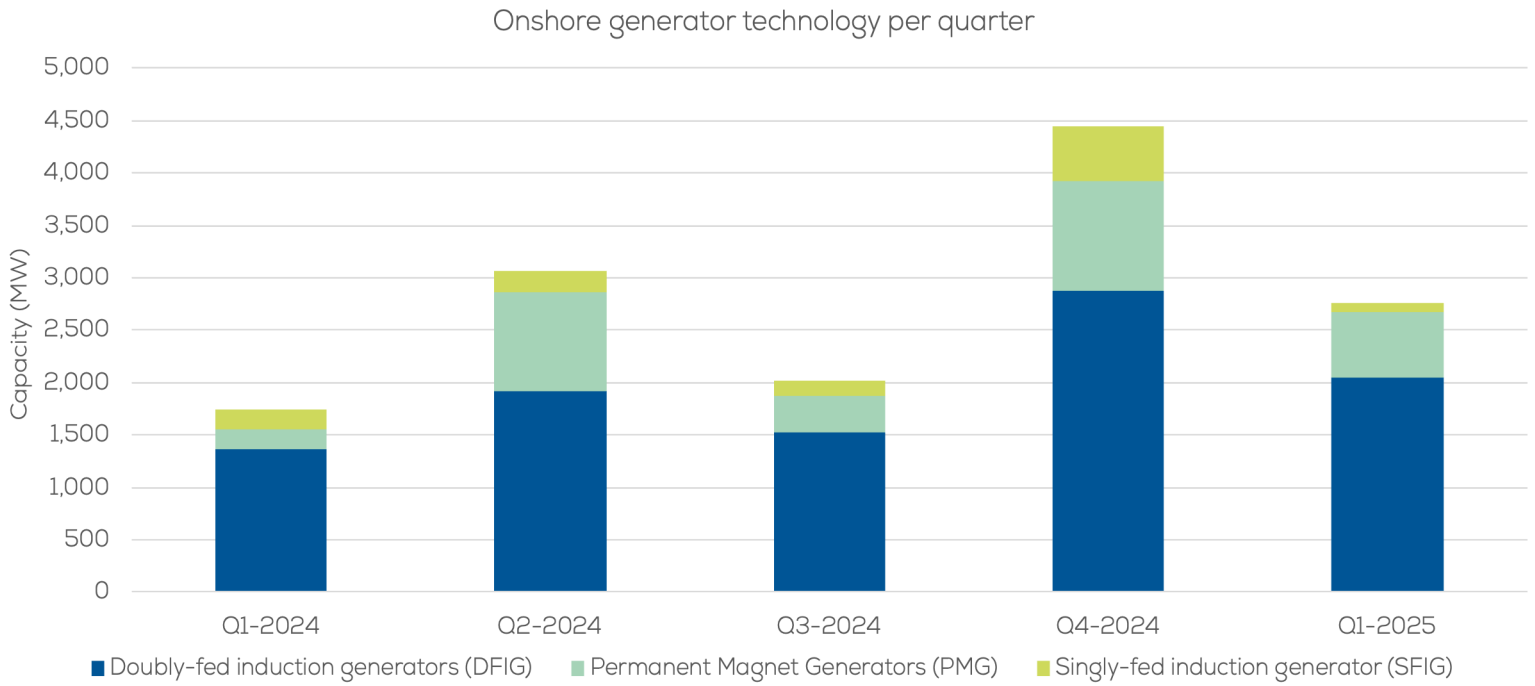


*See Annex (slide 25) for an explanation of the concept of specific power

Source: WindEurope

Most onshore ordered capacity in Q1 2025 was for doubly-fed induction generators, as in Q1-Q4 2024.

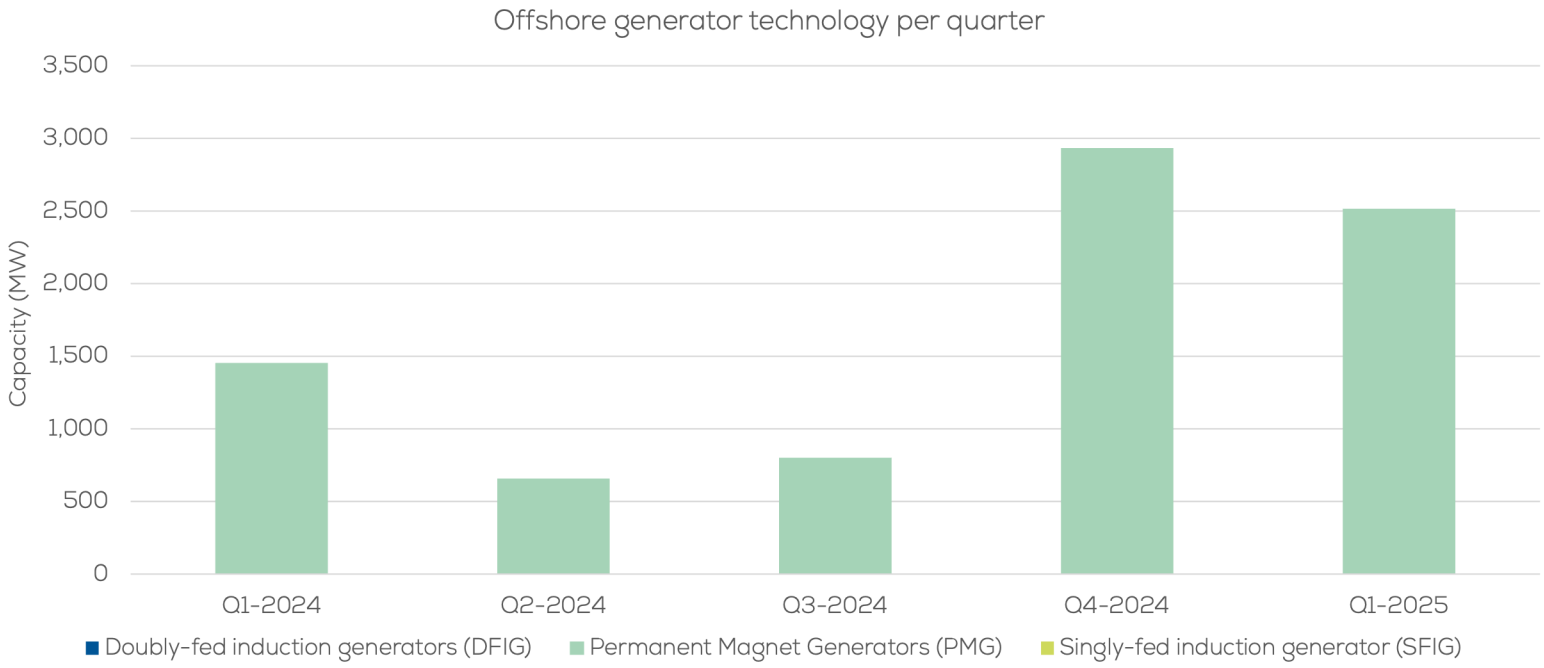
Onshore



Source: WindEurope

All offshore ordered capacity in Q1 2025 was for permanent magnet generators, same as in Q1-Q4 2024.

Offshore



Source: WindEurope

ANNEX - SPECIFIC POWER:

The relation between generator capacity and rotor area can be referred to as specific power (W/m^2). Lower specific powers can lead to greater capacity factors for the same wind conditions. Thus, the evolution of specific power is a factor worth monitoring.

Methodology

WindEurope counts wind turbine orders on the basis of publicly available deals and distinguishes between firm orders and conditional orders. From Q2 2022, undisclosed orders are estimated by deducting firm orders from the total capacity reaching a Final Investment Decision (FID) for the quarter. In Q4 2023 undisclosed orders were updated impacting past estimates.

All types of orders are tracked but analysis per country and company is carried out on firm orders alone, unless specified. We do not track Enercon's orders because they are not publicly available. Furthermore, we do not track small-scale turbines (i.e., those smaller than 1 MW).

Orders are tracked by relying, among others, on:

- offshorewind.biz
- rechargenews.com
- renewablesnow.com
- renews.biz
- windpowermonthly.com
- cleanenergypipeline.com

Results are then cross-checked with companies' officially released information on their websites:

- GE www.ge.com/renewableenergy
- Goldwind www.goldwind.com/en/
- MingYang Smart Energy www.myse.com.cn/en/
- Nordex Acciona www.nordex-online.com/en
- Siemens Gamesa Renewable Energy www.siemensgamesa.com/en-int
- Suzlon Wind Energy A/S www.suzlon.com/
- Vestas www.vestas.com/
- Windey Energy www.windeyenergy.com/en