

Onshore wind supply chain capability assessment summary report

April 2026



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Foreword



Michael Shanks MP

Minister for Energy at the Department for Energy Security and Net Zero and Onshore Wind Industry Council Co-Chair

Onshore wind is at the heart of our mission to take back control of Britain's energy. It's one of the cheapest forms of electricity generation, quick to build, and helps to insulate consumers from price shocks driven by volatile global fossil fuel markets.

In the Clean Power Action Plan, we said we would take radical action to support an increase in onshore wind capacity, and we have been true to our word. Since coming to power, we have removed the onshore wind ban and re-included onshore wind as part of the NSIP Regime. We have brought forward ambitious reforms to the Contracts for Difference scheme and secured over 2GW of new onshore wind capacity in Allocation Rounds 6 and 7. We are addressing turbine interference with Eskdalemuir Seismic Array and consulting on updates to permitted development rights.

We are determined to seize the economic opportunities that a clean power system offers and drive higher living standards across the country. When I co-chaired the Onshore Wind Taskforce we said that more information was needed on the onshore wind supply chain in the UK to support growth and investment. The subsequent Onshore Wind Taskforce Strategy committed Government and RenewableUK to address this by collaborating on a Supply Chain Capability Analysis. I am delighted, therefore, to see the findings of that analysis summarised in this report.

This report underscores the importance of our Clean Power Mission. With UK content of around 70%, the additional 12GW of onshore wind we want to build by 2030 will inject billions of pounds into UK-based businesses over their operational lifetime. Some of this money is already being spent; with planning and environmental consultancies, civil construction and

electrical engineering firms, and through payments to local councils and network companies. With targeted investment in key areas, this report indicates that we could secure an additional £7.6bn spend in the UK by 2035, bringing with it an additional 2,300 jobs.

And Government is already taking steps to realise this vision. In January 2026 we confirmed a £20m grant partnership with Vestas to establish the UK's only onshore wind blade manufacturing facility, saving hundreds of skilled manufacturing jobs on the Isle of Wight in the process. In February 2026 we confirmed that we would reform the Clean Industry Bonus scheme to support onshore wind manufacturing and highly skilled jobs.

In our Industrial Strategy we said we would double down on frontier clean energy industries – like onshore wind – to secure the economic benefits associated with our growth targets. This report tells us that we are on the right track, but that there is more work to be done. We will continue to enable businesses in the onshore wind sector to do what they do best: create growth and drive economic regeneration across the country.



Matthieu Hue

Chief Executive Officer at EDF power solutions UK and Ireland and Onshore Wind Industry Council Co-Chair

As we look to tackle climate change, reduce households' exposure to volatile global gas prices, and realise the UK Government's Clean Power 2030 ambitions, the value of onshore wind to the UK economy is undeniable, offering tremendous potential to boost investment by leveraging our existing capabilities.

The Onshore Wind Industry Taskforce has set a clear path forward, uniting diverse stakeholders within the renewable energy sector. This report underscores the critical importance of our domestic supply chain, building on the robust foundations we've established to create a lasting impact.

We stand on the cusp of a significant opportunity, with projections indicating that our current operating fleet across the UK could potentially triple by 2050. Onshore wind continues to be one of the most cost-effective renewable energy sources and, with 70% of lifecycle spending occurring domestically, we can continue to create high-skilled jobs and drive economic growth.

By focusing on refurbishment, repowering and circularity, we can unlock new supply chain opportunities and empower businesses to thrive.

Realising these ambitions will depend on stable policy support, a transparent project pipeline, a skilled workforce, and strong access to import and export markets. Together, we can solidify the UK's position as a clean energy superpower, leading the way toward a sustainable and prosperous future.

Executive summary

Onshore wind has the potential to deliver over 50GW of installed capacity, creating economic growth and jobs across the whole of the UK. With this opportunity within our grasp, the industry was pleased to see the removal of the de facto onshore wind ban in 2024 and the inclusion of onshore wind in the 2030 Clean Power Action Plan. The study identified up to £154bn of gross value added (GVA) of economic opportunity for the domestic supply chain.

The onshore wind operating fleet currently stands at **16GW** with an expected **50GW** of new or repowered projects between **2026 and 2050** – the Long Term 2050 Scenario – across the whole of the UK. Following a successful Auction Round 7a (AR7a) in February 2026, there has already been 1.3GW across 28 onshore wind projects contracted to build across the country. This new and repowered capacity represents a major long-term industrial opportunity to create economic growth for the UK. **Around 70% of lifecycle spend by domestic onshore projects already takes place in the UK¹**, drawing on a geographically diverse supply chain, with current value concentrated in the operating life phase.

This assessment identifies seven priority supply chain areas that could increase and enhance the amount of UK supply chain; (a) major component refurbishment, (b) turbine blades, (c) high voltage substation electrical equipment, (d) towers and ancillary steelwork, (e) medium voltage wind turbine electrical equipment (f) export cable and array cable manufacturers and (g) nacelle and drivetrain systems. Successful delivery of the Long Term 2050 Scenario has the potential to generate **£154bn** of GVA to the UK economy. The assessment shows us that of this potential £154bn, **£98bn** of GVA can be secured through an existing capability, with an additional **£56bn** GVA possible to secure additional supply chain capability and capacity in the UK.

We believe that these actions relate to three central recommendations, namely;

- making the investment case
- ensuring the UK's manufacturing and industrial base is competitive
- increasing focus on 'refurbishment repowering and circularity'.

Key findings

1

Significant UK value in lifecycle spend

Around **70% of lifecycle spend** by UK onshore wind projects already takes place in the UK, drawing on a geographically diverse supply chain, with current value concentrated in the operating life phase.

2

UK onshore wind supply chain has the potential to capture £154bn of GVA by 2050

With a solid existing capability, the assessment identifies seven priority supply chain areas that could increase and enhance the amount of UK supply chain; (a) major component refurbishment, (b) turbine blades, (c) high voltage substation electrical equipment, (d) towers and ancillary steelwork, (e) medium voltage wind turbine electrical equipment (f) export cable and array cable manufacturers and (g) nacelle and drivetrain systems.

3

Significant opportunity in major component and refurbishment

Major component refurbishment is the most promising area to enhance UK supply chains, whilst other areas present a more challenging proposition.

¹ Includes transmission and distribution charges, taxes and business rates

Onshore wind supply chains across the UK



Vestas — onshore wind turbine blade manufacturing on the Isle of Wight

Vestas has repurposed its longstanding factory on the Isle of Wight to produce blades for onshore wind farms. The Newport plant is the UK's only major turbine component manufacturing facility for onshore wind and sustains over 300 skilled manufacturing jobs on the island.

The transition from producing offshore to onshore turbine blades was supported by a £20m grant from the Department for Energy Security and Net Zero. This new chapter for Vestas on the Isle of Wight builds on its long history and significant contribution to the UK's wind energy journey, with the company having produced more than 13,500 blades on the island over the past 25 years.

The site's impact extends beyond manufacturing. Co-located with Vestas R&D, it is also a global centre of excellence for blade technology, and more than half of Vestas's blade-related patents worldwide are generated on the Isle of Wight.

This technology footprint is set to expand with the recent announcement that NCC (National Composite Centre), part of the High Value Manufacturing Catapult, will establish a new, open-access Large Structures Innovation Centre at West Medina Mills, driving further synergies between R&D, prototyping and production for the wider UK wind industry.



Hutchinson Engineering — tower manufacture in Widnes

Hutchinson employs around 250 people from the local area at its Widnes facility, just outside Liverpool, which supports the manufacture of onshore wind towers that contribute directly to the UK's renewable energy ambitions. By producing critical infrastructure domestically, the company helps strengthen the UK supply chain whilst ensuring that wind energy projects across the country's hillsides are supported by British manufacturing. This capability not only sustains skilled employment within the region but also reinforces the UK's capacity to deliver its net zero targets through locally produced components.

Looking ahead, Hutchinson has a growth strategy to develop a quayside manufacturing facility producing large-scale onshore towers at volume, alongside offshore wind components and other renewable energy products. Realising this ambition over the coming years will enable the company to support evolving turbine technologies, expand UK manufacturing capability, create high-value jobs and supply chain opportunities, and further anchor renewable energy infrastructure within the domestic economy.



Ormazabal UK — engineering services and switchgear manufacture in St Helens

Ormazabal UK is based in St Helens, Merseyside, where it employs around 75 people in skilled engineering, project management and technical support roles, delivering medium voltage electrical systems for the UK's electricity networks and renewable energy sector. Operating in the UK for almost 20 years, the business provides a strong example of existing domestic capability within the electrical balance of plant (EBoP) supply chain with ambitions to grow its influence alongside the growth of the sector. The UK operation combines local engineering expertise with global manufacturing scale, allowing projects to benefit from UK-based design, project engineering, commissioning and service, while maintaining competitiveness in a cost sensitive market.

The future sees Ormazabal UK positioning itself to support the growth of onshore wind through repowering, network reinforcement and increased system complexity, as well as adjacent sectors which are also important to the energy transition. Continued investment in skills, product adaptation and long term customer partnerships will enable the business to play an ongoing role in strengthening the UK's onshore wind supply chain and supporting the delivery of net zero through resilient, locally supported electrical infrastructure.

UK Onshore Wind supply chain

The UK has a geographically diverse supply chain that covers a wide range of specialisms.

1 Renewable Parts

Turbine spare parts supply and refurbishment services, with 20 years' experience.

Packages supplied: WTG spare parts

Customers: Project operators, O&M providers

2 Cooper Turner Beck

Multinational manufacturer of fasteners, with UK facilities in Sheffield and the West Midlands.

Packages supplied: WTG fasteners (tower bolts, blade bolts, other specialist fasteners)

Customers: Tier 1 WTG OEMs (including for export markets)

3 Hutchinson Engineering

Steelwork fabricator with facility in Widnes, employing over 160 people.

Packages supplied: WTG Tower

Customers: Tier 1 WTG OEMs

4 Jones Bros Civil Engineering

Civils contractor with 30 years' experience in onshore wind.

Packages supplied: Civil Works, Cable installation

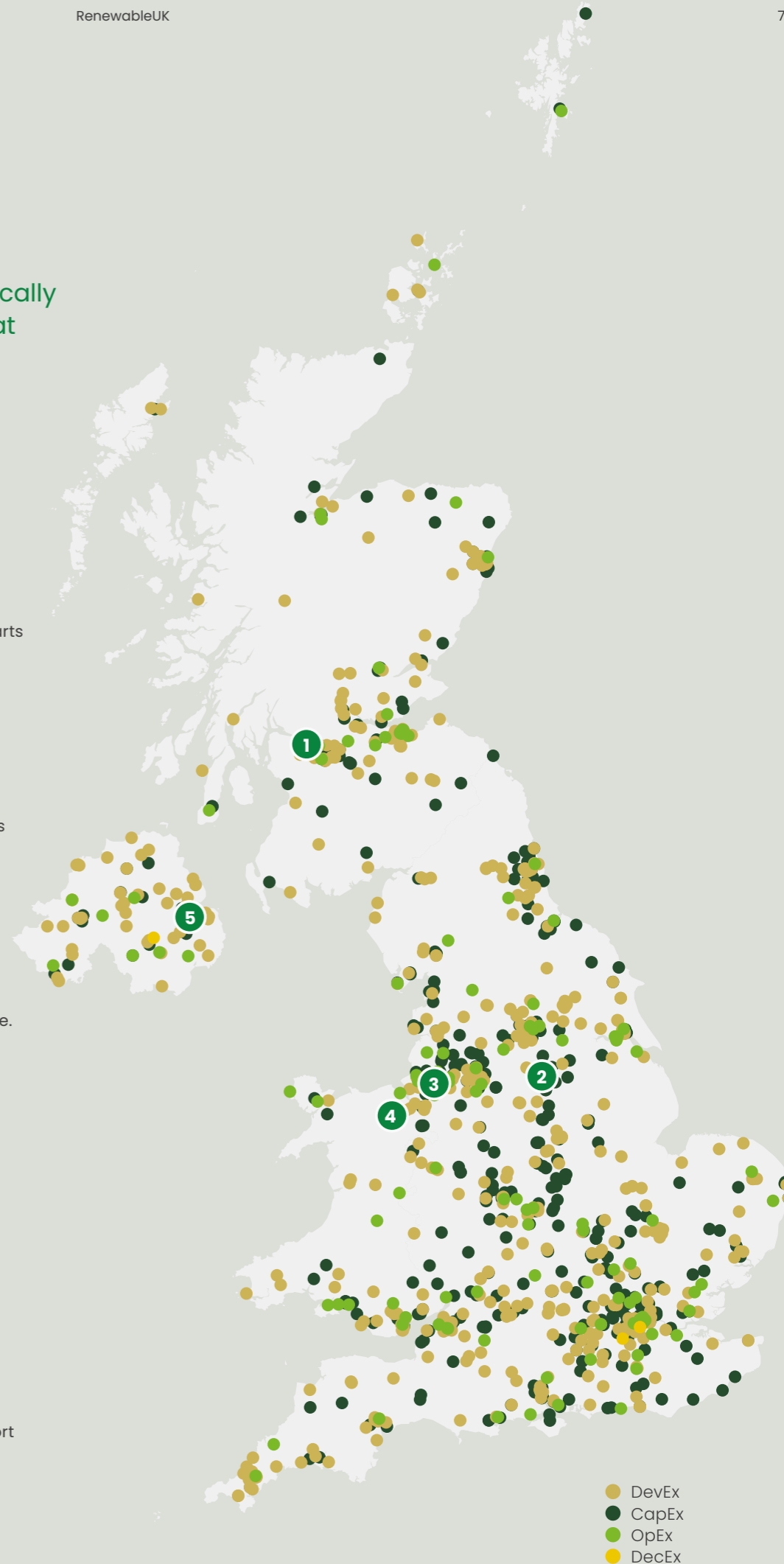
Customers: Project developers

5 Everun

Onshore wind and solar asset management, O&M and repowering services.

Packages supplied: Asset management, WTG Maintenance, Operations Management & Support Services

Customers: Project operators



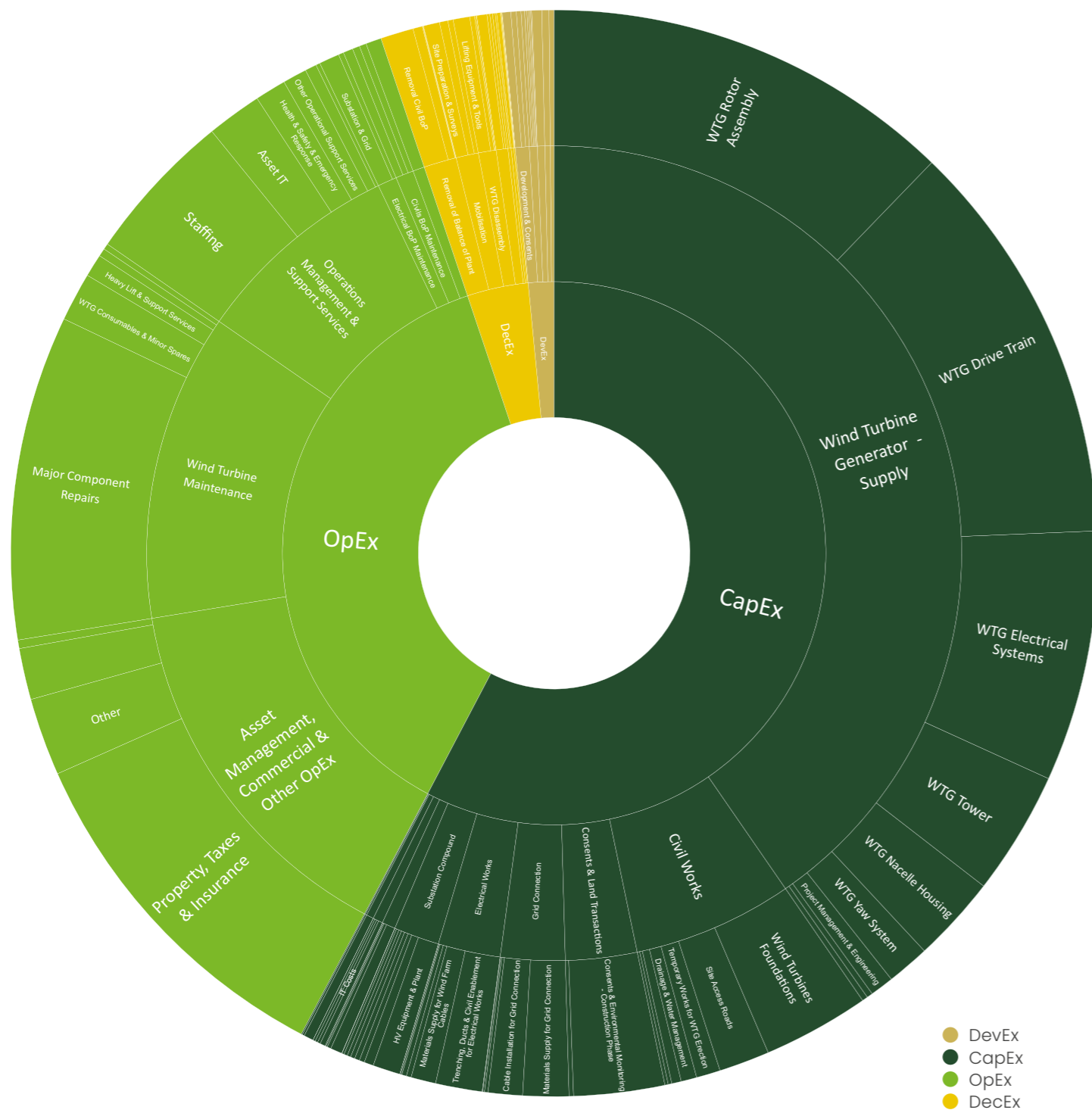
● DevEx
● CapEx
● OpEx
● DecEx

UK capability

The evidence and data indicates that the UK's existing strengths lie in development services, civil works, and operations and maintenance (O&M), which already deliver substantial local content. However, some high-value segments such as turbine manufacturing remain underexploited, limiting economic capture and creating a case for targeted interventions. The assessment also highlights other segments such as electrical balance of plant (EBoP) equipment which may represent an opportunity for onshoring capital spend as part of a multi-sector strategy.

Supply chain spend, for a median project, was mapped across 1,300 individual line items for seven reference projects that characterise the UK's future build of onshore wind. This demonstrates that approximately 45% of the supply chain spend comes from UK sources. The largest proportion of this is still within the construction phase (CapEx), however Operational Expenditure (OpEx) is not far behind.

The diagram below shows UK windfarm supply chain spend by supply item and how that relates to domestic capability.



Priority supply chain areas

The opportunities identified in the report face varying challenges that affect the impact that each priority area will be able to increase and enhance UK supply chain capability. The most achievable near-term gain is in **major component refurbishment**, supported by strong logistics advantages and a growing installed fleet. Larger manufacturing opportunities such as **blade production and electrical equipment** offer higher economic value but require major capital investment, skilled labour, and reliable long-term demand signals.

By combining a detailed analysis of the onshore wind pipeline, through RenewableUK's EnergyPulse database, and an assessment of the products and services used through the entire lifecycle, an economic value data set has been derived. This shows that value potential is concentrated in CapEx, with only one subsystem in the operational category (component spare parts and overhaul) being identified as a priority area.

The assessment categorised two types of additional value, on top of an 'existing capability':

- 1 **'Enhanced capture'** represents additional value that could be delivered through 'easiest to win' packages. This may be via incremental investment or expansion to existing capabilities. 'Repair and refurbishment of major turbine components' is directly linked to this category.
- 2 **'Total capture'** represents 'hard to win' to win packages where the scale of investment would need to be significantly larger and reflect wholly new facilities, such as wind turbine component manufacture, including blades, nacelles, towers, electrical systems and drivetrains. Both a domestic and export market would be required to justify these investments.

Opportunities for increasing value (potential GVA) capture from wind farms built or repowered between now and 2050 can be found in seven priority areas. Ranked from least to most challenging to capture, the areas are:

Priority Area	Potential GVA	Key Opportunities	Key Challenges
1. Replacement & refurbishment of major components during operations	£15.1bn	<ul style="list-style-type: none"> Major growth subsector with existing base demand Strong economic case for local overhaul UK well placed for large component refurbishment 	<ul style="list-style-type: none"> High labour costs Poor market visibility IP/warranty uncertainty
2. Wind turbine blades	£9.1bn	<ul style="list-style-type: none"> Strong UK composites capability Reduced transport costs for UK projects High economic value 	<ul style="list-style-type: none"> Very high capital requirements Fragmented market & insufficient domestic demand Dominant global incumbents
3. High voltage (HV) substation electrical equipment	£1.1bn	<ul style="list-style-type: none"> Potential for UKbased IP, sales & support Crosssector product standardisation can improve viability 	<ul style="list-style-type: none"> High UK manufacturing cost base Large capital investment needed Weaker UK skills base for transformer manufacturing
4. Towers & ancillary steelwork	£4.4bn	<ul style="list-style-type: none"> Competitive UK manufactured towers Strong logistics advantage for local manufacture Potential alignment with offshore clusters 	<ul style="list-style-type: none"> Strong competition from lower cost regions Achieving full local content needs UK steel OEM global supply networks dominate
5. Medium voltage (MV) turbine electrical systems	£6bn	<ul style="list-style-type: none"> UK has specialist adjacentsector skills Potential export markets Opportunity for UK based packaged MV solutions 	<ul style="list-style-type: none"> Hard to compete with low cost global suppliers High capital investment needed Integrated into OEM nacelle plants (mostly non UK)
6. Export & array cables (33-132kV)	£2.7bn	<ul style="list-style-type: none"> Some existing UK manufacturing base Strong aligned demand across energy sectors Good export potential 	<ul style="list-style-type: none"> High capital requirement Need for multisector demand to reach viable scale Global incumbents dominate supply
7. Nacelle & drivetrain	£17.9bn	<ul style="list-style-type: none"> Largest single economic capture opportunity High symbolic & strategic value Local manufacture reduces logistics costs 	<ul style="list-style-type: none"> High cost base

Recommendations

1

Make the investment case

Whilst there is underlying capability in the UK supply chain to capture additional value, most opportunities require increased investment in manufacturing capabilities, which is both capital intensive and dependent on confidence in orders.

The components and services identified in this assessment reaffirm the interdependence and synergies between onshore wind and its adjacent sectors, such as offshore wind and networks. Working with these sectors and industries to identify what the aggregated market is, should enable more robust and compelling investment cases to be made.

It is recommended that the relevant priority areas are considered as part of larger aggregated UK markets to enhance the case for investment. Immediate opportunities to do this can be found in the industry-led **Electricity Networks Sector Growth Plan**² (due to be published in autumn 2026) and **UK Steel's 'Bill of Works for Offshore' report**³. Within a broader aggregated market, a much stronger proposal can be made for publicly backed financial support.

² Electricity Networks Sector Growth Plan

³ www.uksteel.org/steel-procurement

2

Ensure the UK's manufacturing and industrial base is competitive at home and abroad

To protect both existing UK supply chains and increase them through 'enhanced capture' we must ensure that UK products and services are cost competitive. Government Industrial Strategy interventions, such as the British Industrial Competitiveness Scheme (BICS), are an example of measures which could reduce the operational costs of those facilities through lower electricity costs, if they are applied to onshore wind manufacturers. With respect to the assessment, we would recommend this support is focussed on the seven priority areas to maximise impact.

Tariffs and taxes applied to imports and exports also impact competitiveness and we encourage the reduction of tariffs for specific onshore wind manufacturing components, as has recently been introduced for offshore wind.

There is also a regional dimension to this recommendation, noting the introduction of Industrial Strategy Zones (within the Government's Industrial Strategy), proximity to ports and skilled workforces. This could see Government and industry consider how onshore wind supply chains can benefit from existing programmes and mechanisms.

3

Increased focus and work on 'refurbishment, repowering and circularity'

This assessment evidences the levels of refurbishment, repowering and circularity that would be required over the coming decades, where 'replacement and refurbishment of major components during operations' has been identified as one of the major opportunities to grow the supply chain.

We recommend that further work is undertaken on understanding the scale, locations and timing of onshore wind decommissioning across the UK. This would support the developments of business cases for supply chain companies looking to handle waste recycling requirements and major component refurbishment and replacement (O&M). In addition, this would align with the ambitions outlined in the **Scottish Onshore Wind Sector Deal**⁴ and identify the interventions required to unlock the GVA potential.

⁴ www.gov.scot/publications/onshore-wind-sector-deal-scotland

Glossary

Term	Definition
BICS	British Industrial Competitiveness Scheme
CapEx	Capital Expenditure
DecEx	Decommissioning Expenditure
DevEx	Development Expenditure
EBoP	Electrical Balance of Plant
EPC/I	Engineering, Procurement, Construction / Installation
GVA	Gross-Value Added
HV	High Voltage
MV	Medium Voltage
NCC	National Composite Centre
OEM	Original Equipment Manufacturer
O&M	Operations & Maintenance
OpEx	Operational Expenditure
R&D	Research & Development
SCCA	Supply Chain Capability Assessment
WBS	Work Breakdown Structure
WTG	Wind Turbine Generator





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