

Solar Market Survey & Latest Trends

APVI Workshop Solar, Storage & New Business Models

Warwick Johnston

Managing Director

SunWiz

About SunWiz

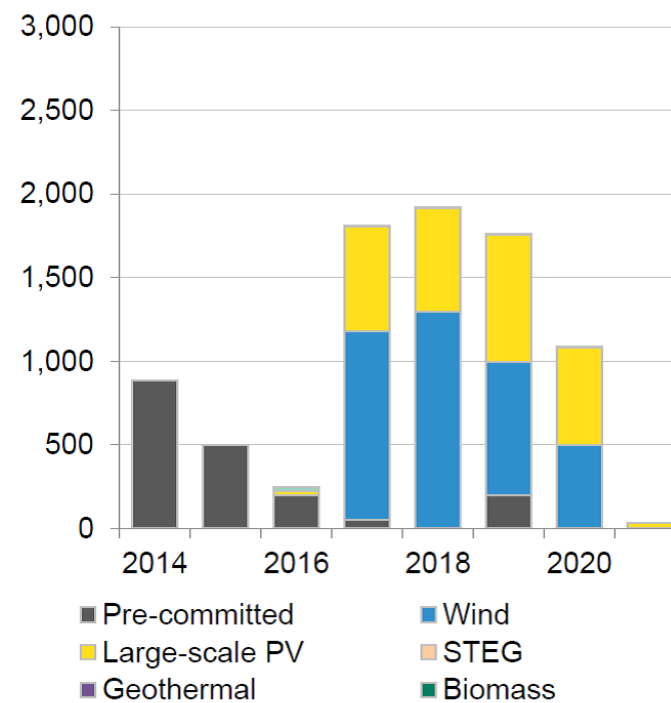
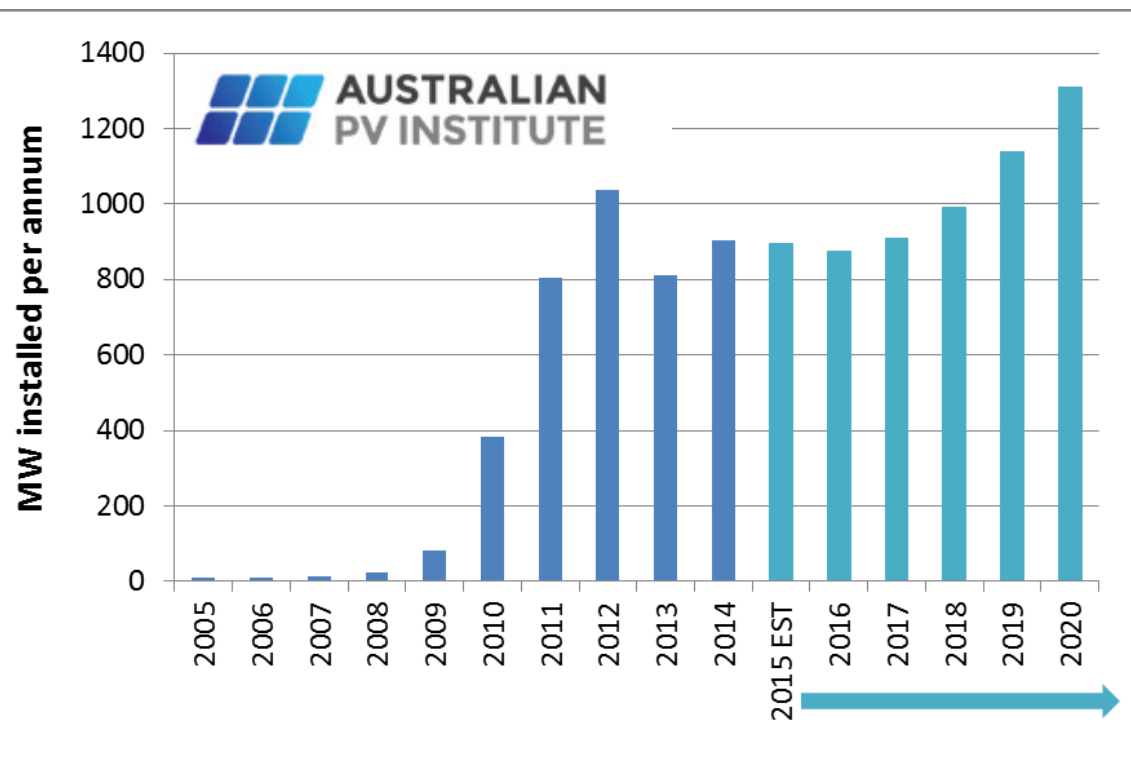
- Most prevalent, accurate and up-to-date provider of Australian PV Intel since 2009
- Trusted by PV Industry Organisations, Top Manufacturers Distributors and Retailers
- + opportunity identification, financial evaluation, engineering and project assistance
- IEA-PVPS Task 1 Representative
- Involved in APVI Solar Map

SunLoving, Eager to Please, Hard Working & Intelligent.... Sunny is part of SunWiz

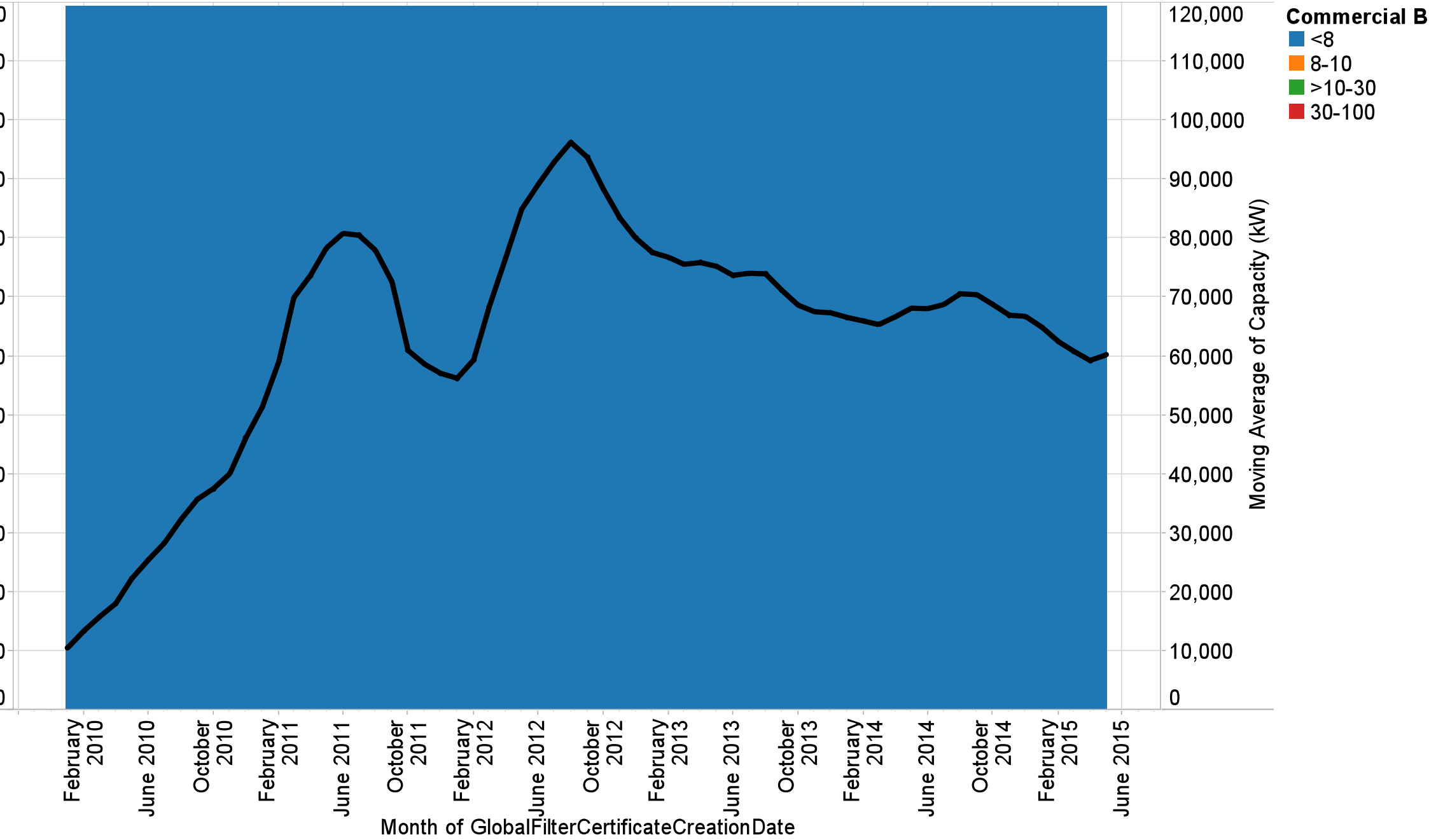


Trends

- 2014 on par with 2013 in sub-100kW range
- Plus Commercial & Utility... brings up to 0.9GW last year
- #1 Trend: Commercial

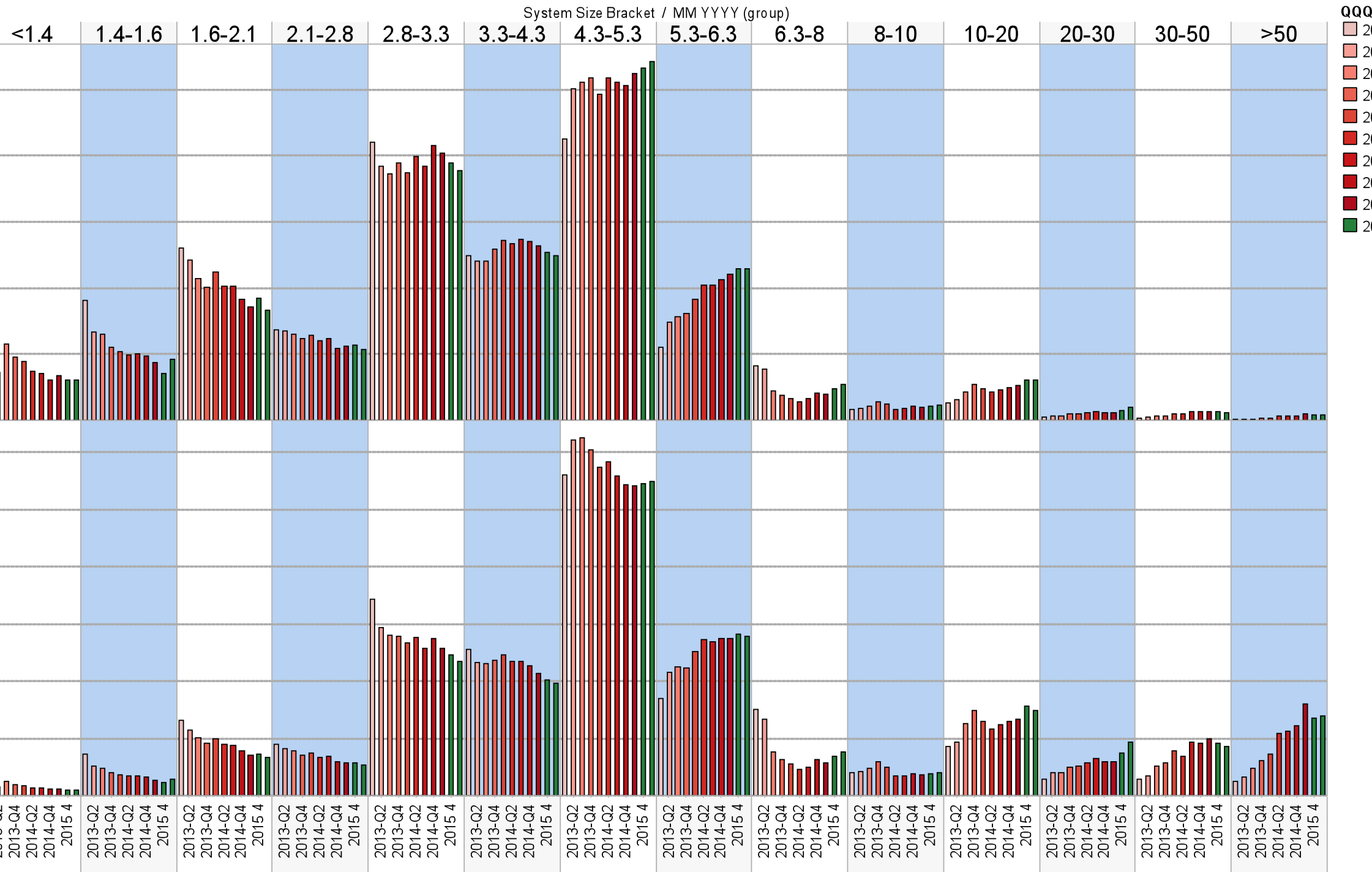


Note: Pre-committed capacity includes projects that have been recently completed, have financing secured, are under construction or are expected to be built from government grant programmes. STEG – Solar Thermal Electricity Generation.



Trends

- Energy Storage:
 - Everyone asks, <2 % proceeds.
 - Tesla ... payback at best 5.5 years if off the back of new PV
- Monitoring: Of increasing importance



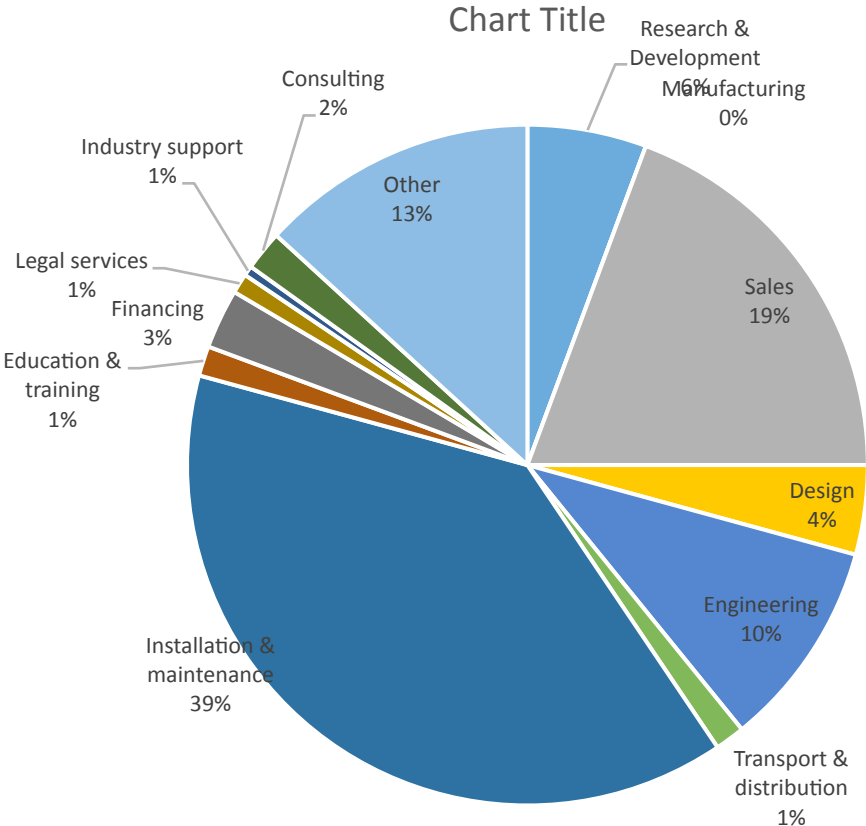
Survey

- GC: 12,000 kW (ex Flagship)
- GC with Battery backup: 109kW, mostly residential, ranging from 5-30kWh of storage
- Off Grid: 807kW (190kW residential, 570kW diesel grids)
- Prices:
 - Rooftop 3-10kW \$1.98/W ex GST
 - Rooftop > 10kW \$1.78/W ex GST
 - OffGrid/battery backup: \$6-10/W
 - Panels: typically charged customers \$1/W
- 196 employees across 28 respondents

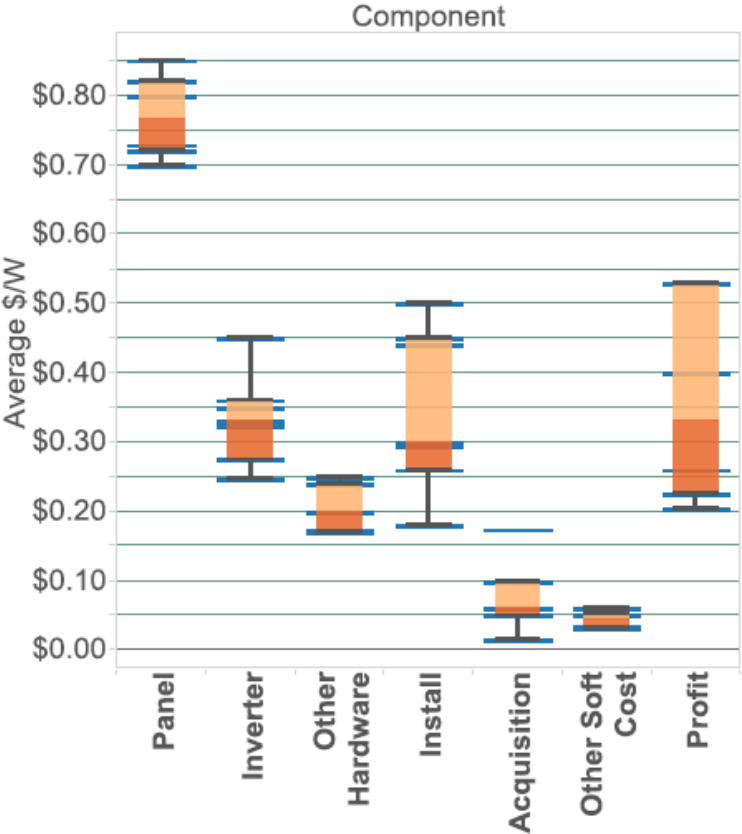
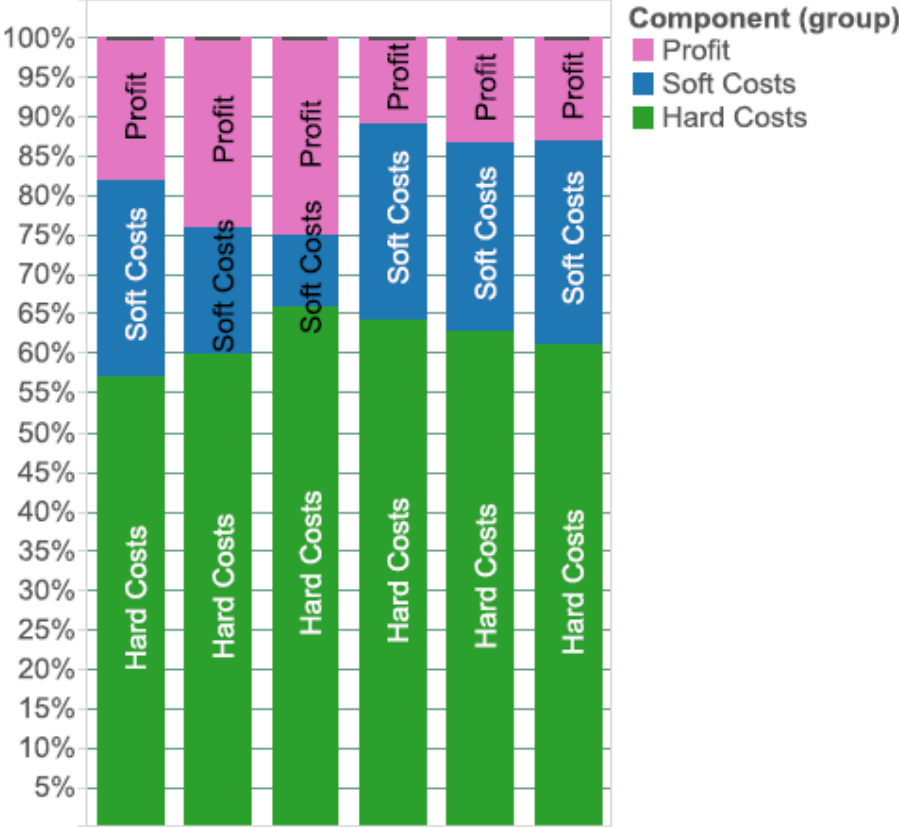


Employment

- 212 employees from 28 respondents, ~56kW/employee (though biased by R&D respondents?)... 14,000 solar employees



Prices and breakdown



Timeframes

