



AUSTRALIAN PV MANUFACTURING STUDY |

RATIONALE

Australia installs ~4GWp of PV per year and is in the top 10 countries for installations and capacity

Australia produces many of the raw materials used in the PV value chain and holds significant IP, yet is almost totally reliant on imports

As PV becomes a dominant energy source, supply chain security risks are increasing, as are import costs, trade tensions and slave labour concerns

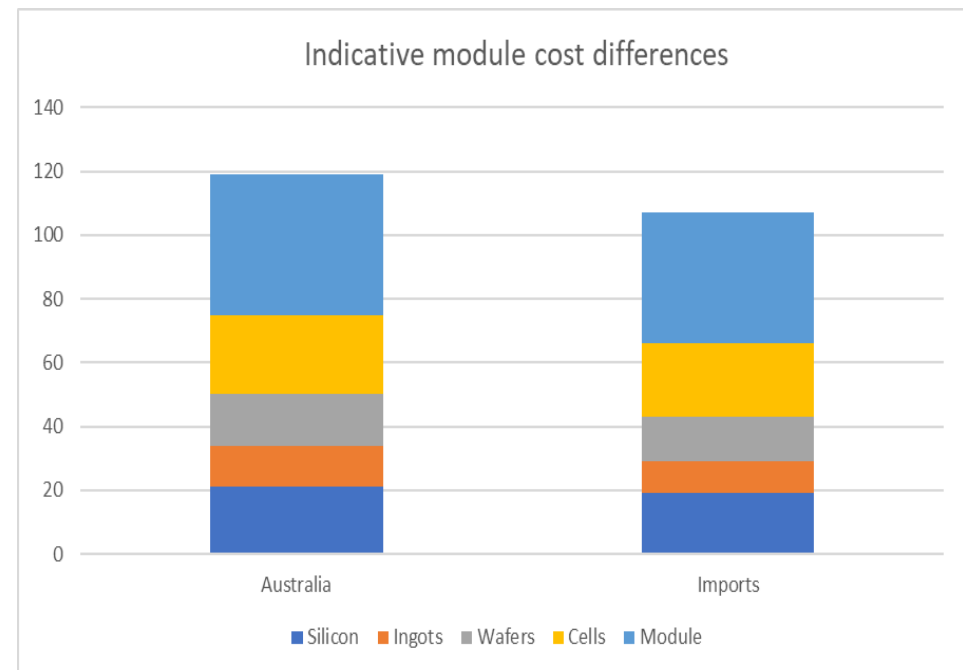
Australia has a huge opportunity to supply the growing green manufacturing market using our low-cost, abundant clean energy

OBJECTIVE: TO ASSESS AUSTRALIAN MANUFACTURING POTENTIAL ALONG THE PV VALUE CHAIN

Step 1: Comparison of Australian and international manufacturing costs for Silicon PV Modules

How do we bridge the gaps?

Sensitivities to labour, shipping, electricity prices, carbon prices, tariffs, efficiency



FUTURE STEPS

2. Input material manufacturing potential, barriers and strategies, including green Silicon, steel, glass, Silver, Copper
3. Thin Film PV manufacturing opportunities
4. System and installation component potential
5. End-of life opportunities