AUSTRALIAN PV INSTITUTE

Media Release **February 2024**

Release of APVI's PV Supply Chain 'Silicon to Solar' Study

The APVI today announced that it has released the findings of its Silicon to Solar (S2S) study.

The study examined the opportunity for Australia to establish viable, relevant, and timely local manufacturing along the solar PV supply chain. This spanned the production stages of poly-silicon, ingots/wafers, cells, and modules.

Australia's aspirational transition to a renewable energy superpower is heavily reliant on the availability of solar modules, which are predominantly manufactured in China. This dependency on a single external source raises concerns about Australia's control, influence over and opportunity to benefit from the solar supply chain and, therefore, its renewable energy future.

> *"The 'Silicon to Solar' study compares manufacturing costs in China and Australia for current state-of-the-art technology and explores ways of overcoming cost gaps in each manufacturing stage. It then presents a Roadmap for developing a PV manufacturing value chain in Australia over time, along with policy levers which can be used to facilitate this".*

The APVI undertook the study in partnership with the Australian Centre for Advanced Photovoltaics (ACAP) and with assistance from Bright Dimension, ITP Renewables and Deloitte Financial Services. Advisory Board members with extensive experience in PV manufacturing and industry development have guided the work: Mark Twidell, Mark Bonnar and David Jordan. Funding was provided by ARENA, with industry contributions from AGL, AspiraDAC, Siemens, Energus, SunDrive, 5B, and Tindo Solar.

A wide range of Australian and international industry and government agencies have been engaged to ensure that the assessment is current and that the opportunities identified reflect the conditions necessary for businesses to establish PV manufacturing in Australia.

Key recommendations include:

- Establishing Solar PV Manufacturing as a Strategic Priority Industry for Australia.
- Examining ways to facilitate PV manufacturing workforce development, approvals, permitting, and international partnerships.
- Developing supply-side policy support levers, including concessional finance and production credits.

- Encouraging demand-side policy levers across all levels of government, including government procurement, circular economy drivers and local content incentives.

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About the APVI

The Australian Photovoltaics Institute is a not-for-profit, member-based organisation which focuses on data analysis, independent and balanced information, and collaborative research. Our objective is to support the increased development and use of PV via research, analysis, and information.

The APVI promotes solar through its live solar mapping platform [http://pv-map.apvi.org.au], the national solar research conference [Australian Photovoltaic Institute | Asia-Pacific Solar Research Conference (apvi.org.au)] and Australia's participation in two International Energy Agency (IEA) programs – PVPS (Photovoltaic Power Systems) for solar photovoltaics and SHC (Solar Heating and Cooling), concerned with new solar thermal products and services [APVI Projects with the International Energy Agency - APVI].

www.apvi.org.au