

SunWiz Market Analytics:
The Luminare Intel Platform
- ESS Businesses -

Why SunWiz is Australia's:

Primary PV & ESS Market Analyst



2009
Company Established



1500+
Happy Clients

- Founded by Warwick Johnston in 2009
- Authority on Australia's Solar & Storage market.
- Primary provider of Market Analytics to Australian Solar & Storage Industry
- Industry Leadership: CEC Board Director, Previous leadership roles in APVI, AuSES/Smart Energy Council, Solar Energy Industries Association, International Energy Agency
- Regular Presenter at leading conferences and exhibitions energy



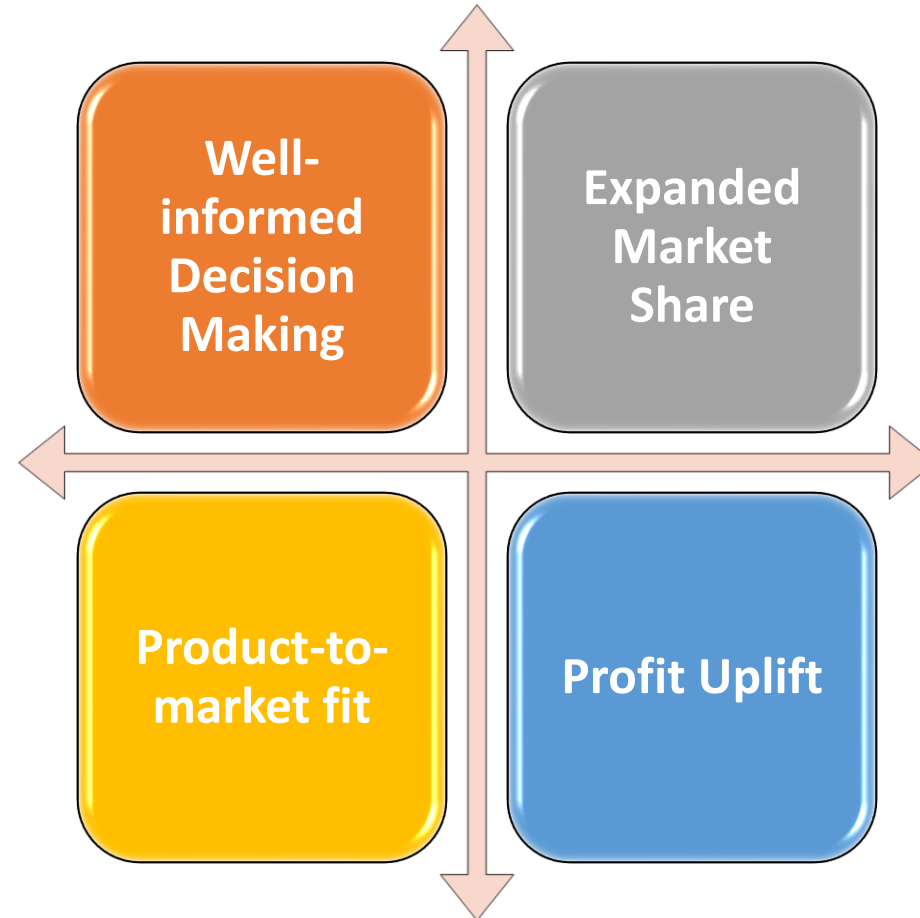
Our data is integral to critical decisions made by ESS & PV Manufacturers, Wholesalers, Distributors, Solar Installers & Government Agencies

"We would like to thank SunWiz again, as **our sales have grown 6 times** larger than back to the old days when we did not buy from SunWiz."

- Rex Wang | Marketing Specialist | Growatt Energy

Why Market Intel:

Outcomes Market Intel Delivers



Why Luminate:

Outcomes Luminate Delivers



Improve Market Share

- Track competitors
- Understand why you're losing share
- Identify key customers



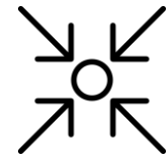
Price Optimally

- Brand Premium
- Profit-maximizing prices



Track The Market

- Keep up with latest trends
- Report to HQ



Clever Targeting

- Best locations for sales & warehouses



Stock / Resource Outlook

- Forecasting for market demand, volumes and more



Best Sellers

- Sell what's popular
- Industry buying profiles



Meet Customer Demand

- Sizes
- Technical Aspects



Know Finance

- Demonstrate & track revenue uplift, attachment rate and more

See how Luminate delivers each aspect by clicking on the icons

Impressive Delivery Platform








SunWiz Analytics are available via:

- ✓ Online Platform
- ✓ Email Delivery
- ✓ Interactive Data
- ✓ Customizable Content Possible



Your Luminate:

Three Great Options

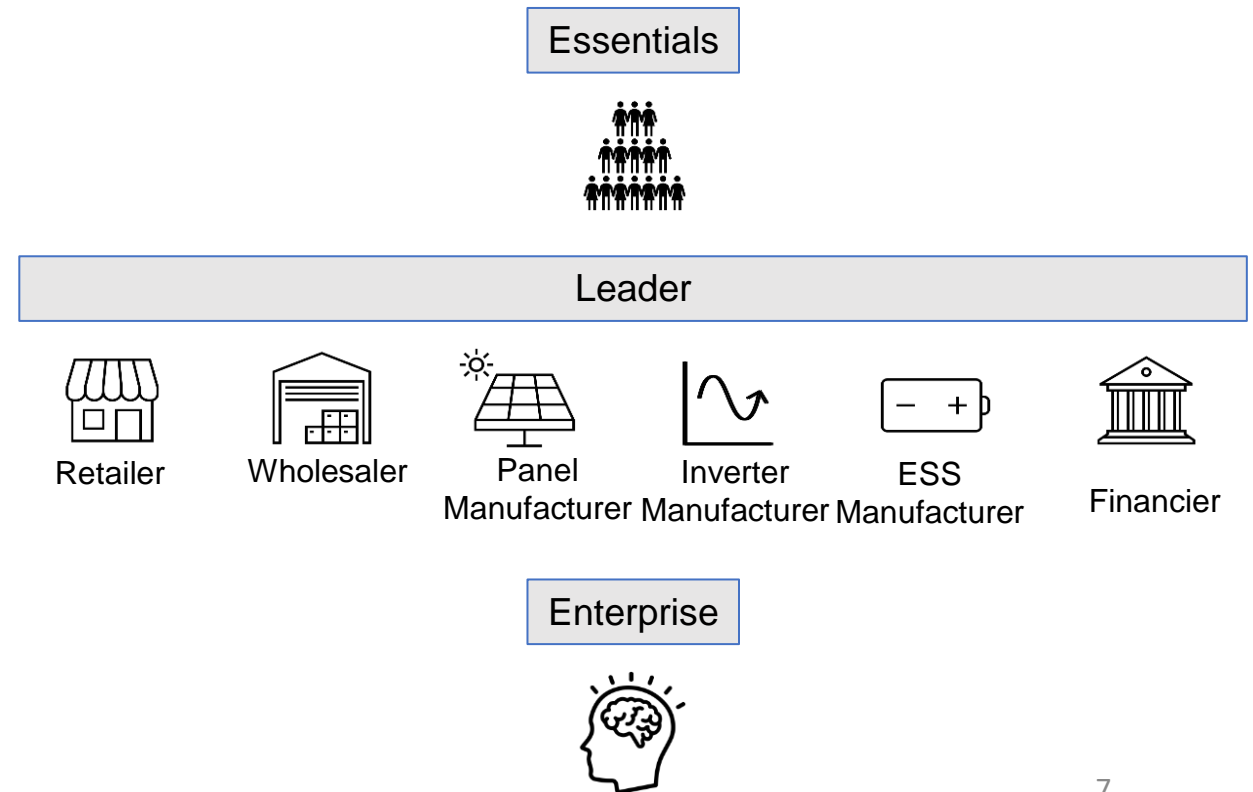
	Essentials	Leader	Enterprise
	The must-know content to not fall behind	A bundle of information designed for your market segment	Everything you need to know to understand and dominate the industry
Users included	5	10	20
Interactive users	0	1	3
Subscriber-only Webinar Access			
Personal Call with SunWiz CEO	Annually	Semi-Annually	Quarterly
Annual in-person Company Presentation			
Customised Content			
Year in Review Report			
25% off any SunWiz Annual Report			

Sample our content

1. Scroll onwards in this document for an overview of the content that delivers each outcome, or click on an icon below to jump to the outcome of interest...

 Track & Report Trends	 Improve Market Share	 Stock / Resource Outlook	 Meet Customer Demands
 Price Optimally	 Clever Targeting	 Best Sellers	 Know Finance

- OR
2. View all the Content that's included in each bundle



Ways to move forward from here

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View	<u>View material on our portal</u>
Order	<u>Order Now</u>

Volumes & Sizes



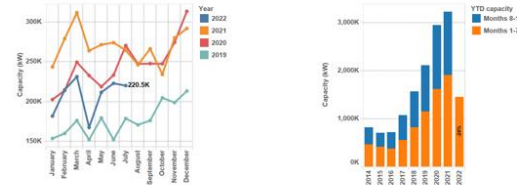
Don't get left behind, with weekly and monthly updates on key trends in the market as they evolve.

A huge amount of information on trends in PV & ESS markets, as seen in the following slides.

THE NATIONAL TREND - REGISTERED VOLUME

THE SMALLEST START TO THE YEAR SINCE 2019

MONTHLY VOLUME - RECENT YEARS YTD COMPARED TO SAME TIME LAST YEAR



The 220MW recorded in July 2022 is still below volumes observed at the same time in 2020. Volumes are back up to what was seen over Feb / March.

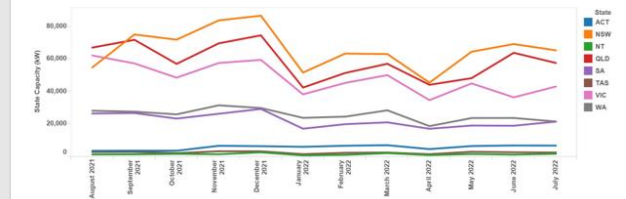
This chart shows the monthly registered volume of RTG systems by year for recent years.

This chart shows the progressive annual tally for recent years, illustrating what was registered to the same point in each year, compared to what was ultimately installed in previous years.

EACH STATE CONTRIBUTES ITS OWN TREND TO THE NATION

ACROSS THE LAST 12 MONTHS, THE TREND IS DOWN IN MOST STATES

MONTHLY REGISTERED CAPACITY BY STATE



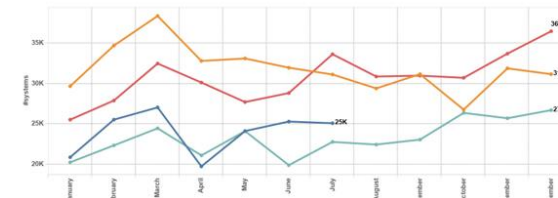
Of the major states, only VIC and SA increased in volumes whereas NSW, QLD and WA fell. In percentage terms, the increase was greatest in VIC (1.8%) and the decrease greatest in QLD (1.1%).

This chart shows the capacity of 5000 (sub-100kW) installations by state and month of system registration.

ANNUAL SUB-100KW SYSTEM REGISTRATIONS

SOLAR BUSINESSES EXPERIENCE ACTIVITY IN TERMS OF CUSTOMER NUMBERS

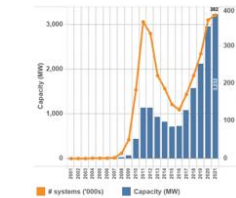
LAST 4 YEARS



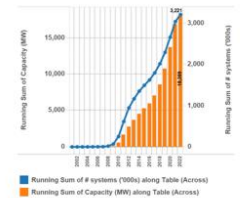
ANNUAL VOLUMES OF SUB-100KW INSTALLATIONS

NATIONAL REGISTRATION TALLIES

ANNUAL REGISTRATION TALLY



CUMULATIVE TALLY



Report to HQ



An interactive portal of information with pre-prepared charts at your fingertips available for download.

Our portal enables you to

- Find information with ease
- Interact with content
- Download charts and reports
- Download chart data into your own charting software
- View customised reports



REGULAR MONTHLY ALL-TOPIC HIGHLIGHTS

Email Edit @ Sub ☆ Fav

SUNWIZ SEPTEMBER MARKET ANALYSIS WEBINAR

SunWiz is hosting a 1 hour session that will cover the latest market update PLUS free viewing of content that's been recently developed.

When: Thursday - Sep 8, 2022 11:00 AM Canberra, Melbourne, Sydney

Advanced Registration is required: [Register Here](#)

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2022-08 STC MARKET UPDATE & EXEC SUMMARY

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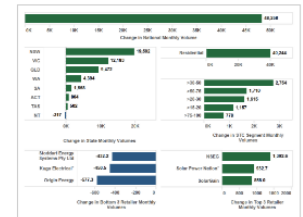
2022-09 STC MARKET UPDATE & EXEC SUMMARY

In this month's STC market synopsis we look at August's figures.

August 2022 volumes set a new high for the year and broke through figures reported at the same time in previous years.

All state volumes grew (except for NT) as did all STC capacity brackets.

Solar Power Nation overtook Origin for #2 place as Origin's creation is well down on its typical level, for some time now - we believe this to be STC creation hold-ups rather than any issues with sales & installation.



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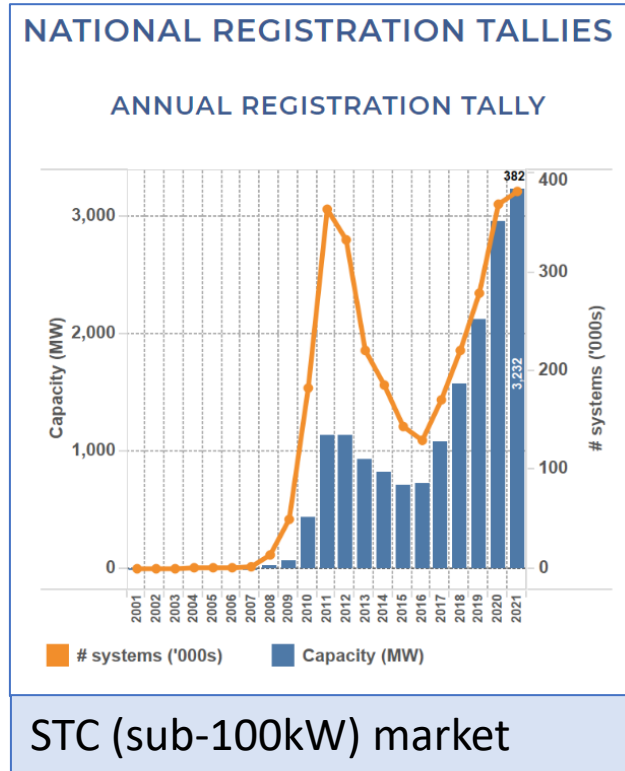
2022-08 MID MONTH UPDATE INCLUDING LUMINATE ESSENTIALS LONG-FORM REPORT

Evaluate Market Share

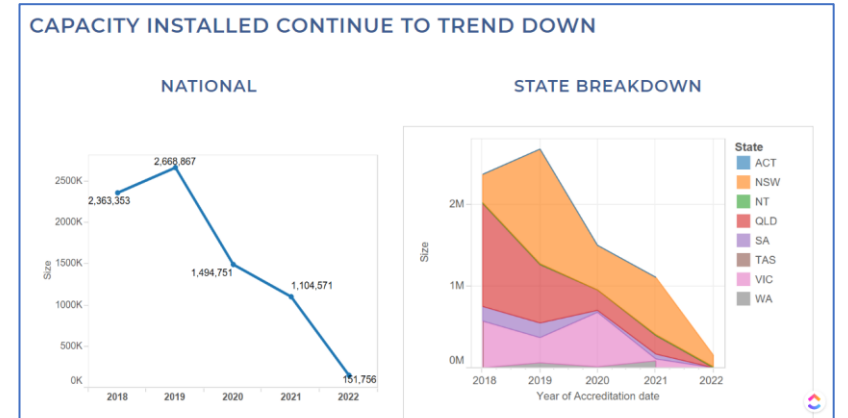


Get instant feedback on your performance by calculating your market share

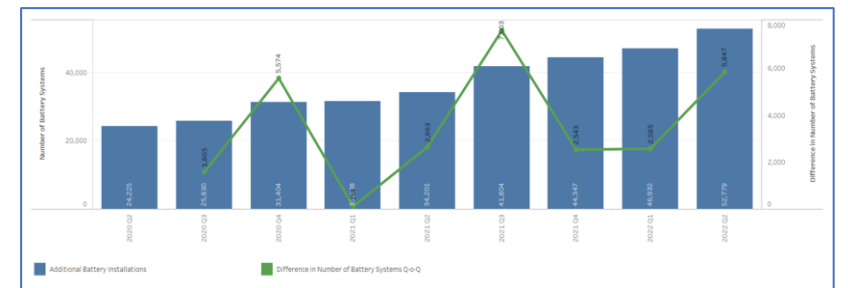
Charts cover market volume for the PV and ESS Markets annually & sub-annually, nationally & by state, by size range.



STC (sub-100kW) market



LGC Market



ESS Market

Improve Market Share

Grow Market Share



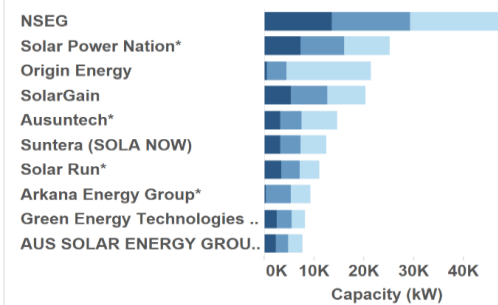
Grow your market share by identifying key PV & ESS Retailers & calculating your Share-of-Wallet

Charts revealing Top Retailers / Large Retailers / New Retailers / High-Growth Retailers

Plus All Vic ESS Retailers

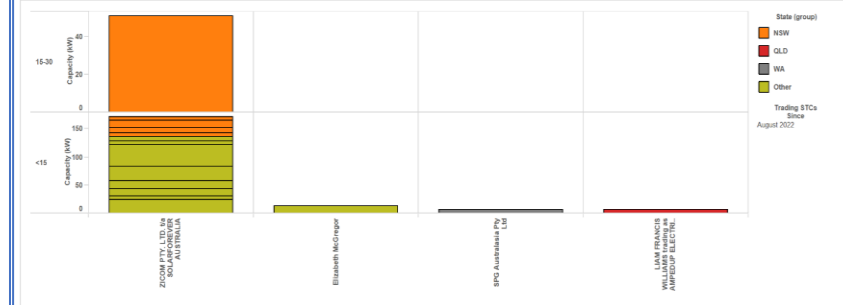
RANKING BY QUARTER

VOLUME REGISTERED RANKING



LAST 2 MONTHS

TRADING STCS

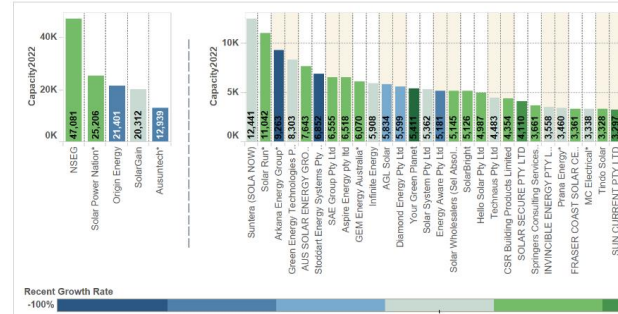


Top PV Retailers

TOP 50 RETAILERS

RANKING & GROWTH RATE - RECENT MONTHS

VOLUME REGISTERED RANKING



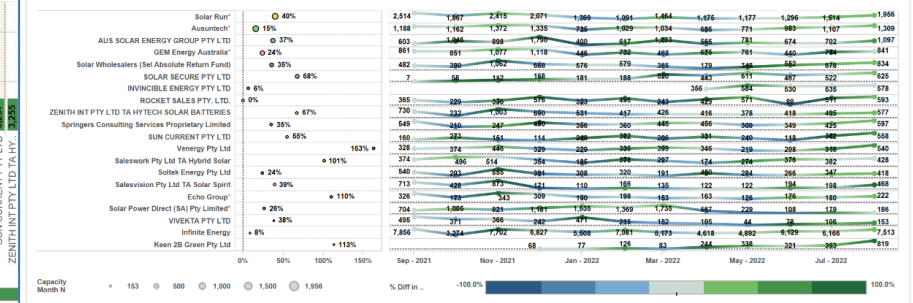
Large PV Retailers

New PV Retailers

TOP 20 GROWTH COMPANIES

LAST 12 MONTHS

VOLUME & GROWTH RATE



High-Growth PV Retailers

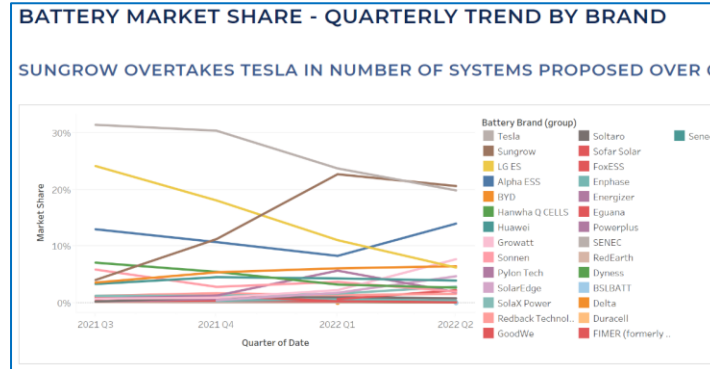
Improve Market Share

Grow Market Share

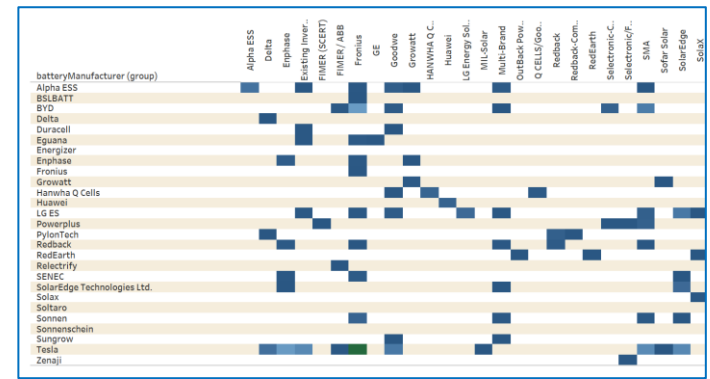


Track your competitors' market share to reveal if your strategy is working

Charts revealing ESS brand market share nationally. Plus common ESS-inverter pairings, and more.



Trend in ESS Brand Market Share



Common ESS-Inverter pairings

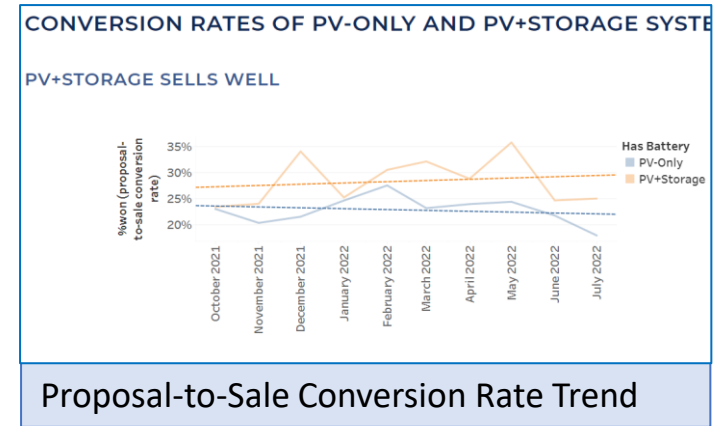
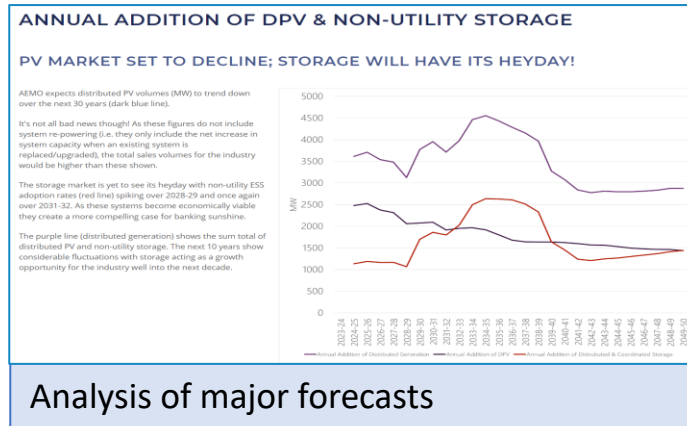
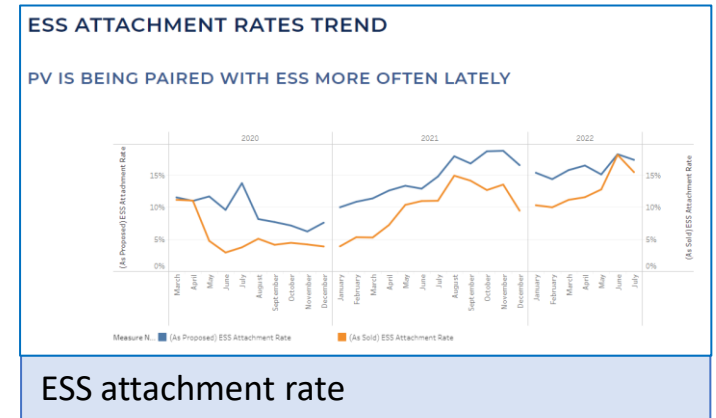
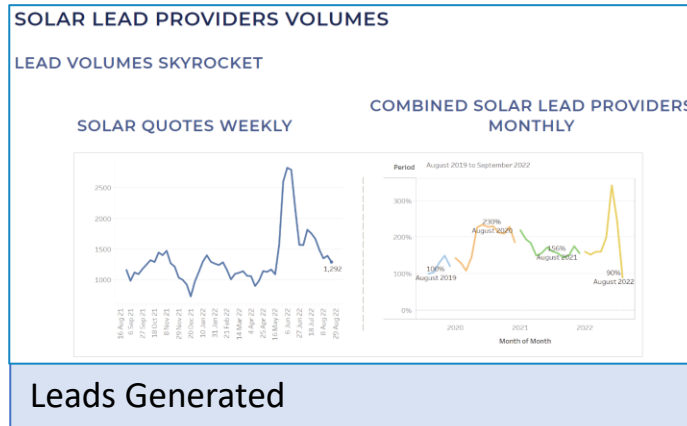
Plan Weeks & Years Ahead



Know how much stock to order in the short & medium term, and what to plan for long-term.

Better inform your 3-month projection with PV lead generation activity, as-sold battery-attachment rates, and indexes on conversion rate.

Get a fully-informed long-term outlook with SunWiz's analytical summary of forecasts from leading analysts

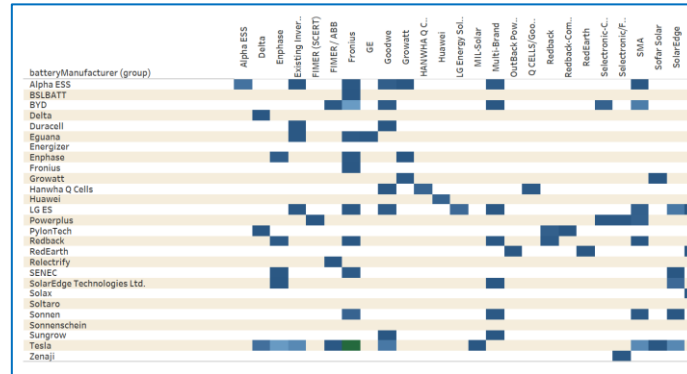


Design Products That Match

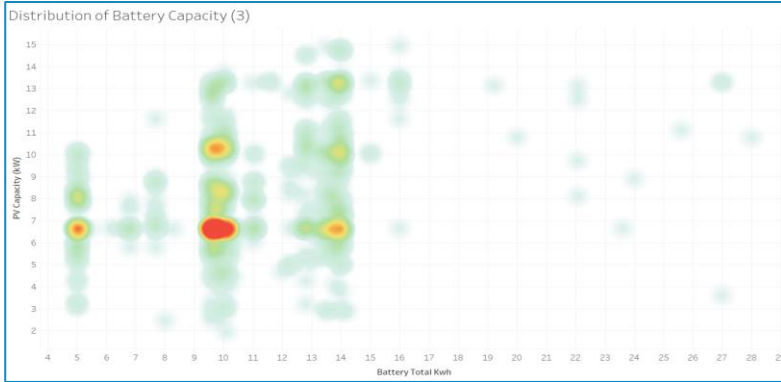


Design products that match the technology you're paired to using as-designed technical information.

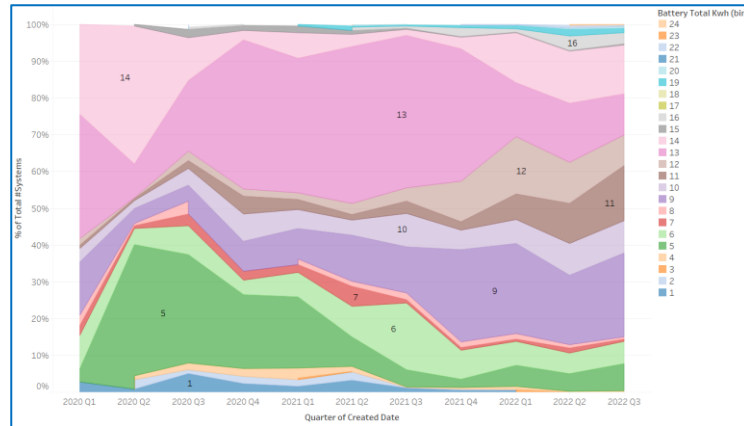
Charts Revealing: Panel-to-Storage capacity, Battery size distribution, Common ESS-to-inverter pairings



Common ESS-Inverter pairings



Panel kW to Storage kWh capacity



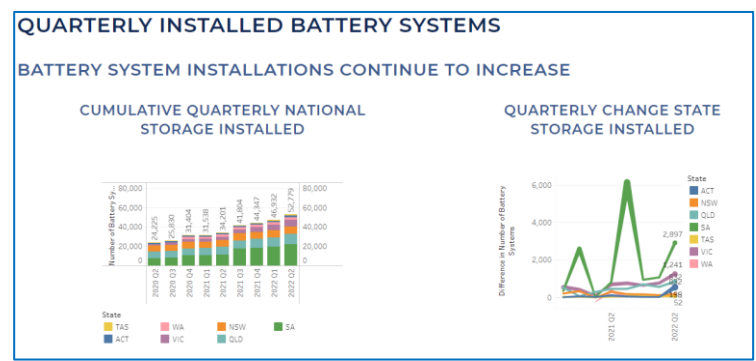
ESS size breakdown

What To Focus On

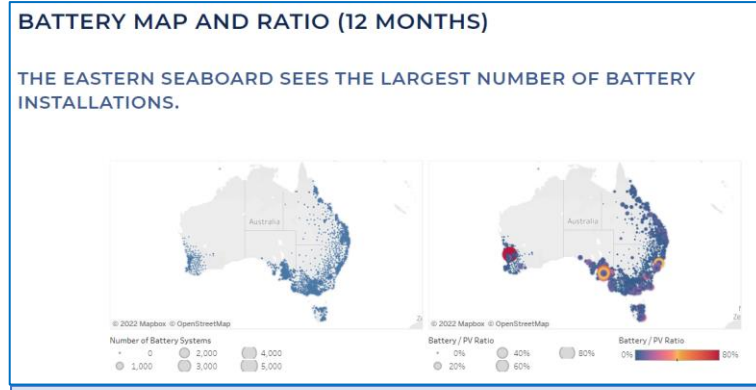


Concentrate on the best states & locations to target, so your business maximises its impact.

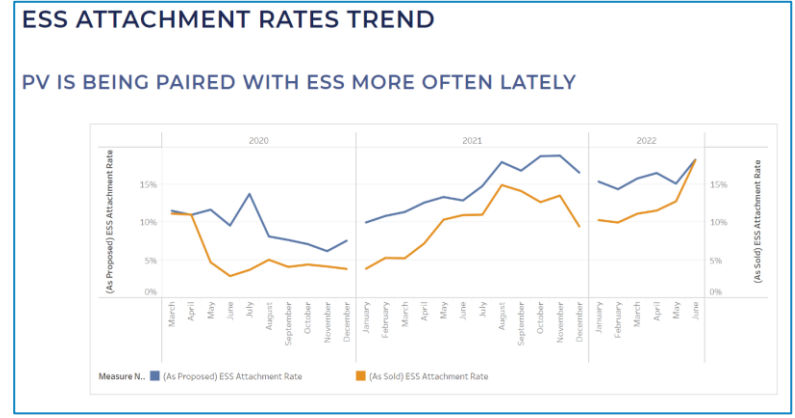
Charts Revealing: Trend in capacity by state, trend in ESS-to-PV attachment rates, ESS locations.



Monthly capacity by state



Trend in capacity by segment



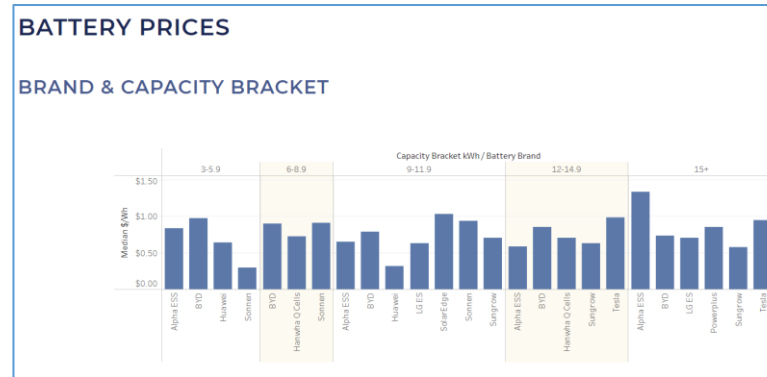
ESS attachment rate to PV

Understand Your Brand's Price Premium

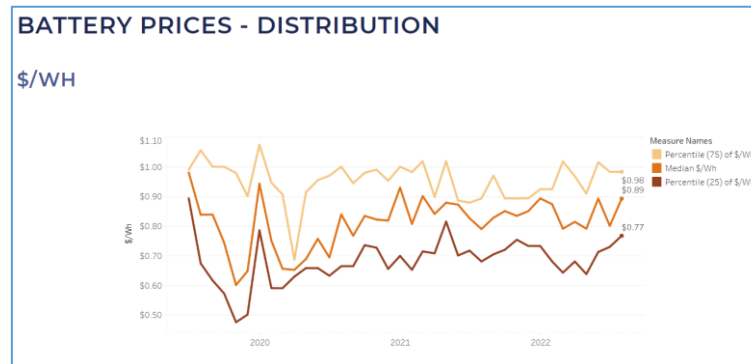


Manufacturers: Understand the premium your brand fetches on the market

Charts on ESS pricing nationally and by state, by size, and by brand.



Range of Pricing by Panel brand



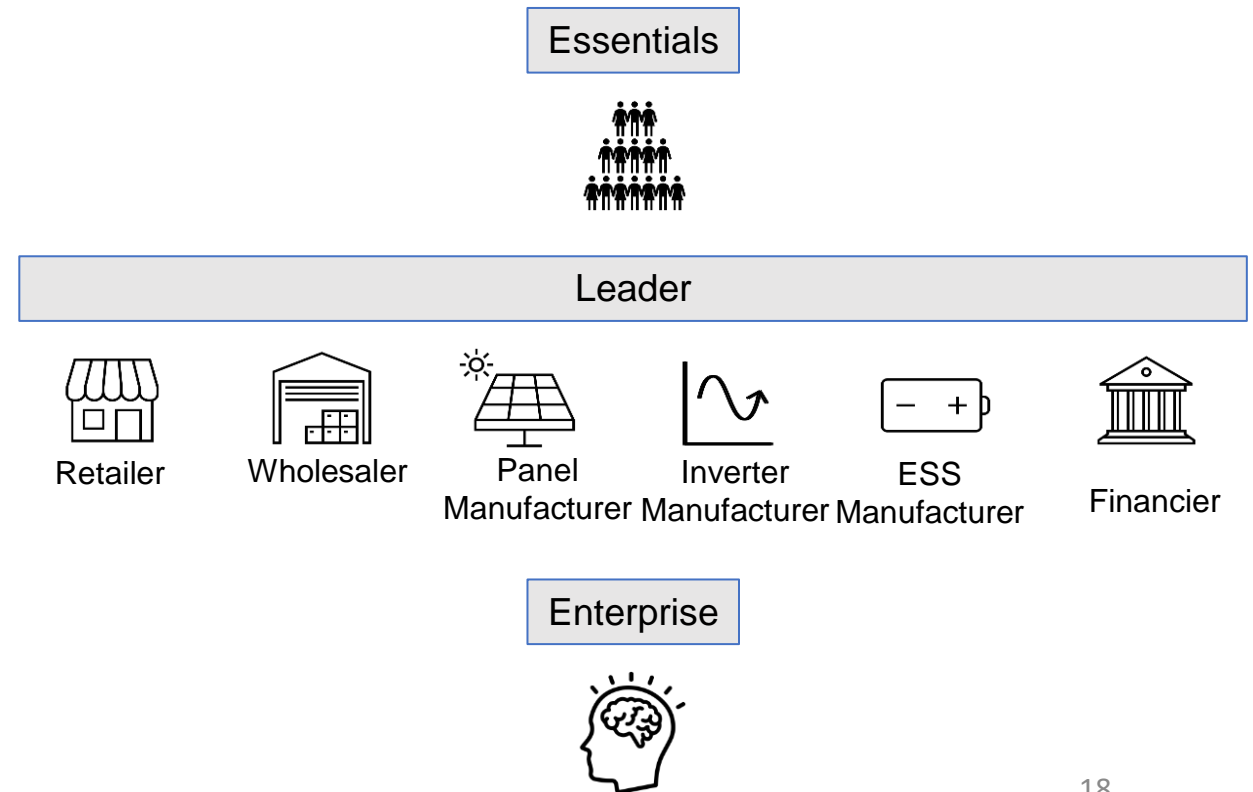
Pricing Trends

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