

SunWiz Market Analytics:
The Luminare Intel Platform
- Panel Manufacturers -

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



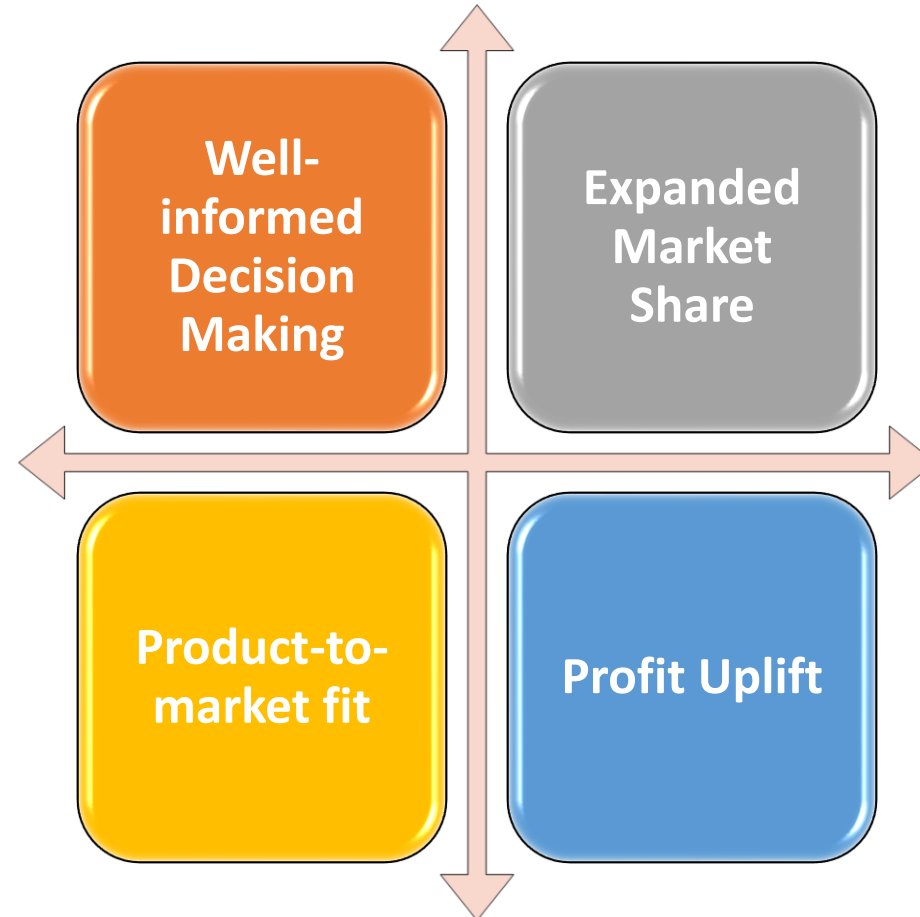
Our data is integral to critical decisions made by ESS & PV Manufacturers, Wholesalers, Distributors, Solar Installers & Government Agencies

"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



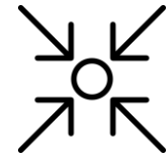
Price Optimally

- 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

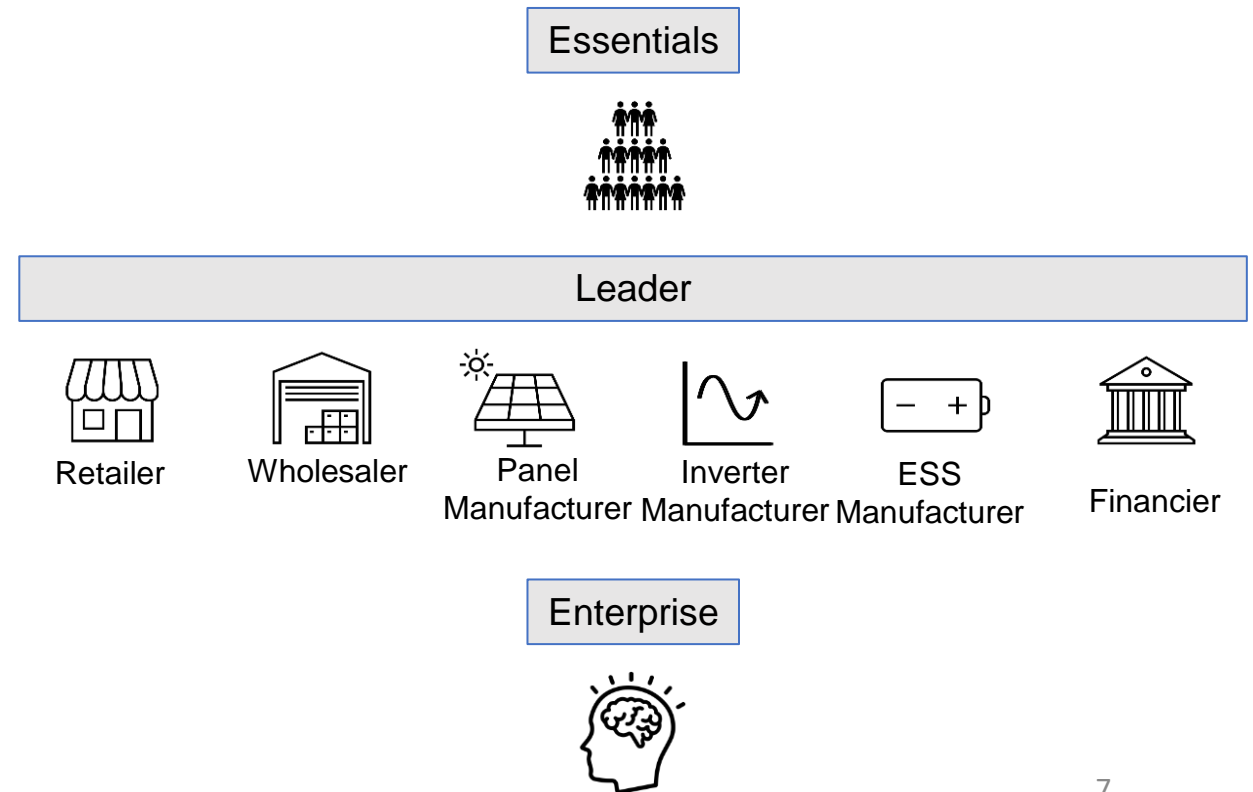
	Essentials	Leader	Enterprise
	The must-know content to not fall behind	A bundle of information designed for your market segment	Everything you need to know to understand and dominate the industry
Users included	5	10	20
Interactive users	0	1	3
Subscriber-only Webinar Access			
Personal Call with SunWiz 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

Book	<u>Book a call</u>
View	<u>View material on our portal</u>
Order	<u>Order Now</u>

Volumes & Sizes



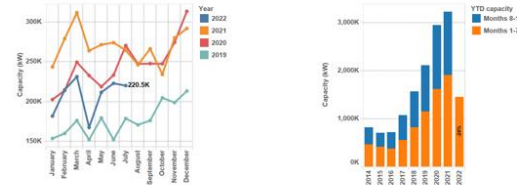
Don't get left behind, with weekly and monthly updates on key trends in the market as they evolve.

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



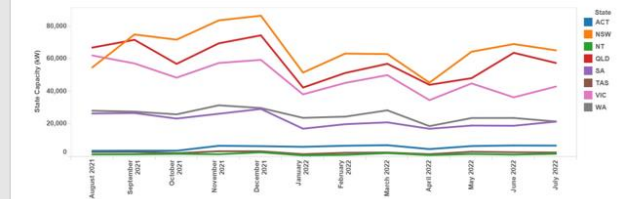
The 220MW recorded in July 2022 is still below volumes observed at the same time in 2020. Volumes are back up to what was seen over Feb / March.

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



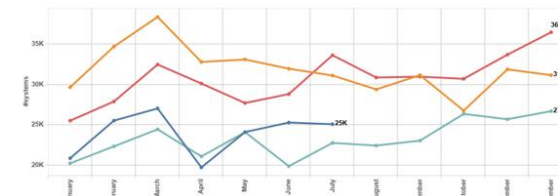
Of the major states, only VIC and SA increased in volumes whereas NSW, QLD and WA fell. In percentage terms, the increase was greatest in VIC (1.8%) and the decrease greatest in QLD (1.1%).

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

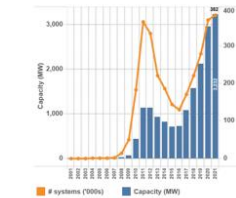
LAST 4 YEARS



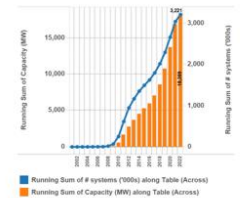
ANNUAL VOLUMES OF SUB-100KW INSTALLATIONS

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

[Email](#) [Edit](#) [@ Sub](#) [☆ Fav](#)

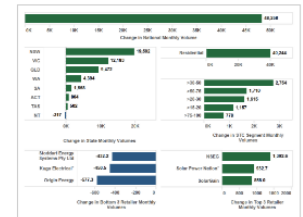
2022-09 STC MARKET UPDATE & EXEC SUMMARY

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

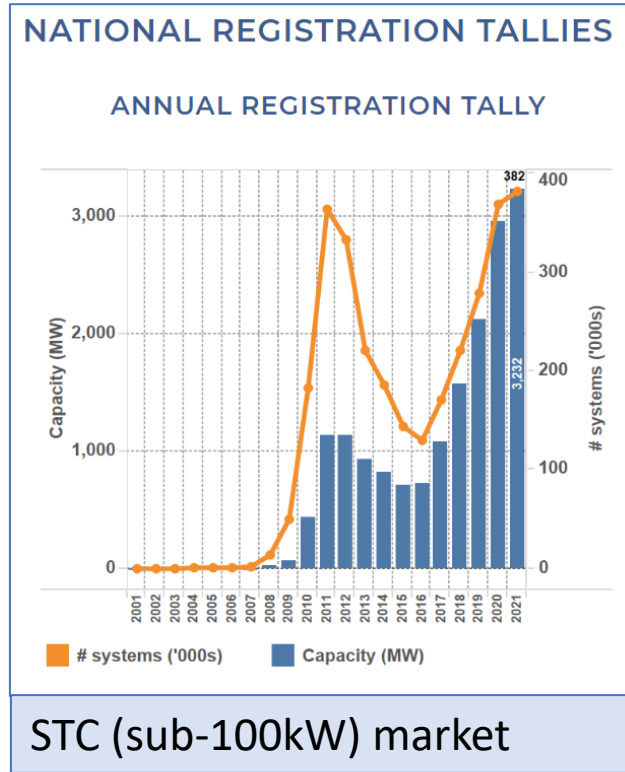


Get instant feedback on your performance by calculating your market share

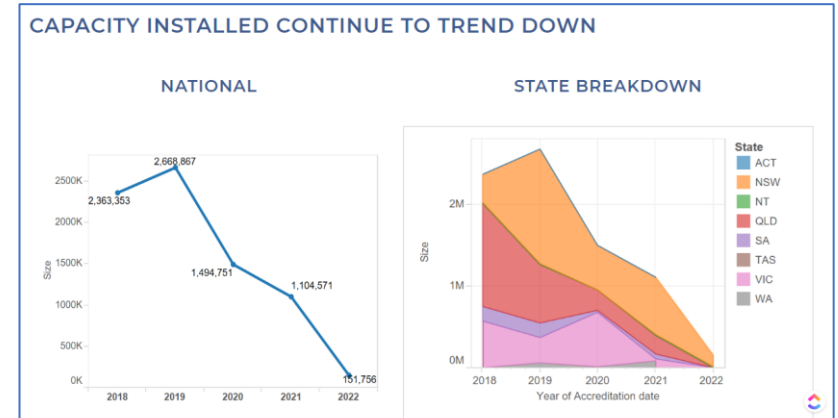
Charts cover market volume for the PV annually & sub-annually, nationally & by state, by size range.

Plus national ESS installation trends quarterly.

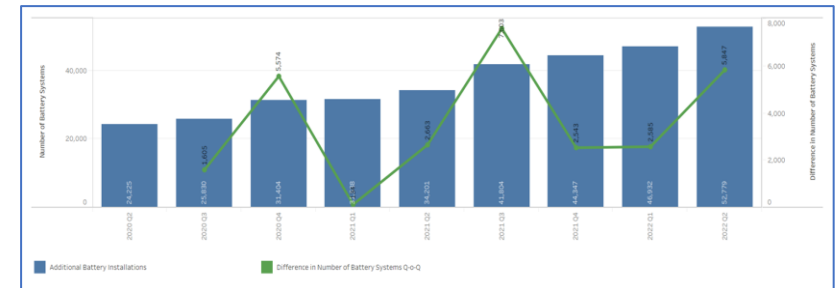
Enterprise upgrade provides further ESS information.



STC (sub-100kW) market



LGC Market



ESS Market

Improve Market Share

Grow Market Share

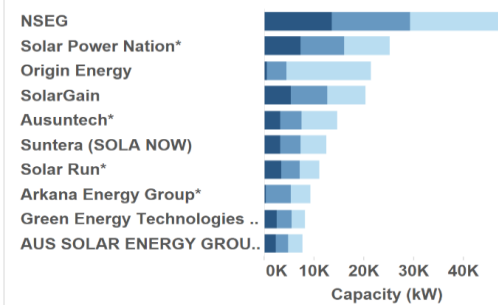


Grow your market share by identifying key PV Retailers & calculating your Share-of-Wallet

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

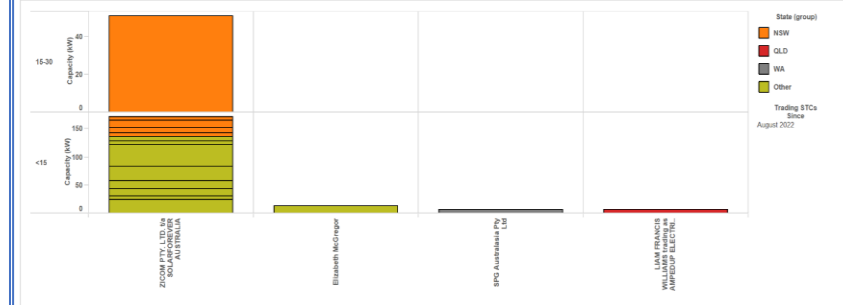
RANKING BY QUARTER

VOLUME REGISTERED RANKING



LAST 2 MONTHS

TRADING STCS

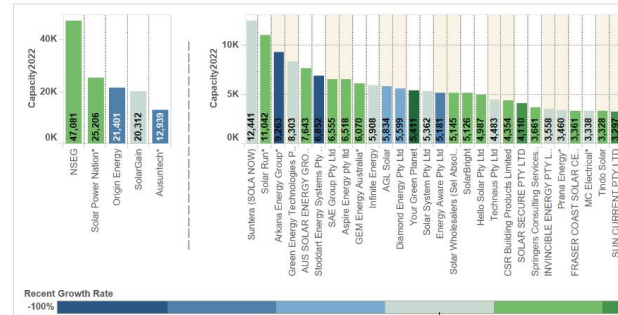


Top Retailers

TOP 50 RETAILERS

RANKING & GROWTH RATE - RECENT MONTHS

VOLUME REGISTERED RANKING

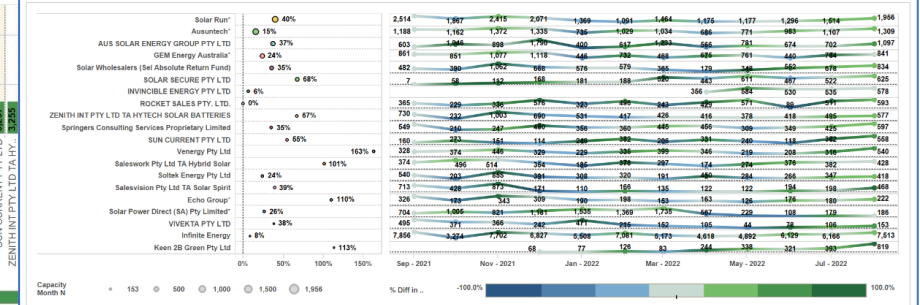


New Retailers

TOP 20 GROWTH COMPANIES

LAST 12 MONTHS

VOLUME & GROWTH RATE



Large Retailers

High-Growth Retailers

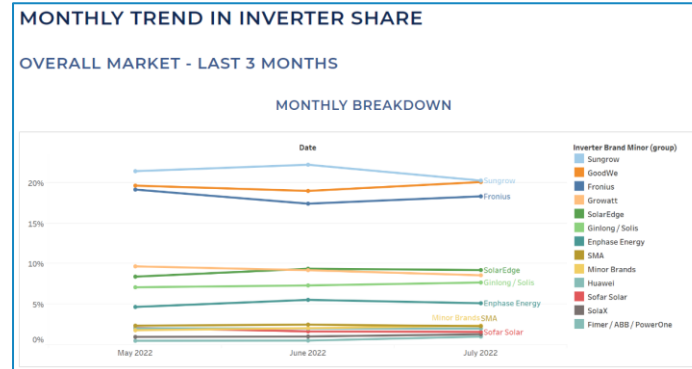
Improve Market Share

Grow Market Share

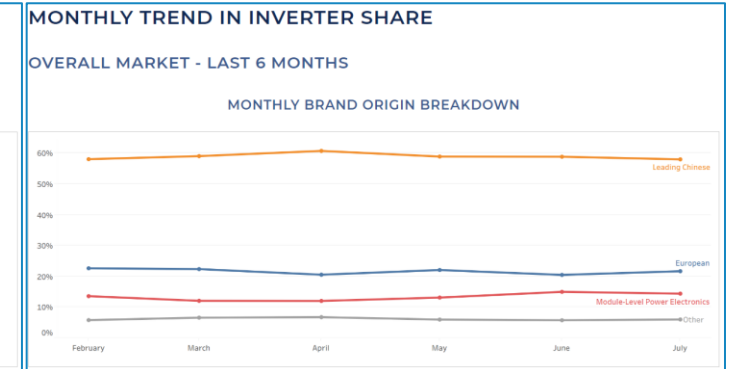


Track your competitors' market share to reveal if your strategy is working

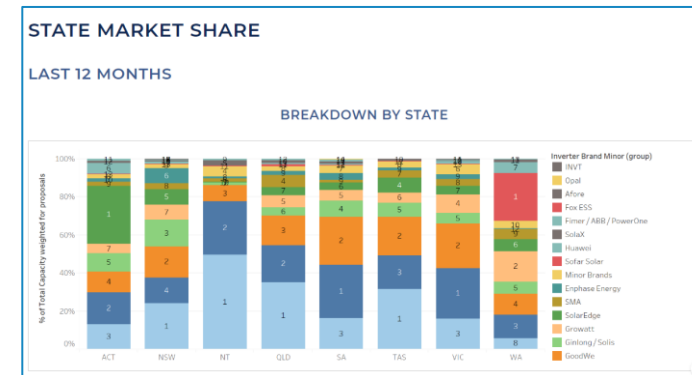
Charts revealing Inverter / Panel brand market share nationally, by state, and by segment. Plus class-share-of-market, and more.



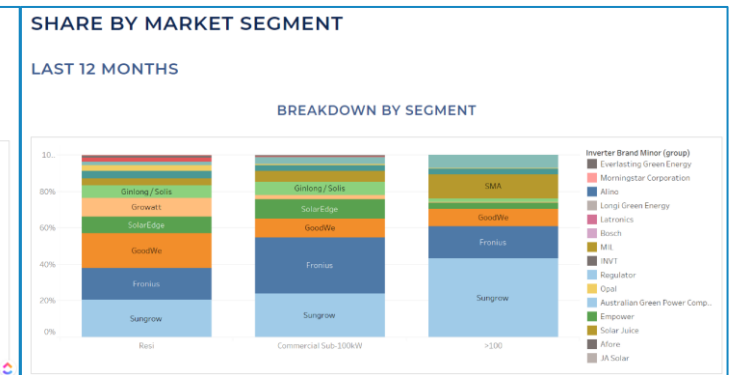
Trend in Brand Market Share



Equipment Class Share of Market



Brand market share by state



Brand market share by segment

Protect Market Share



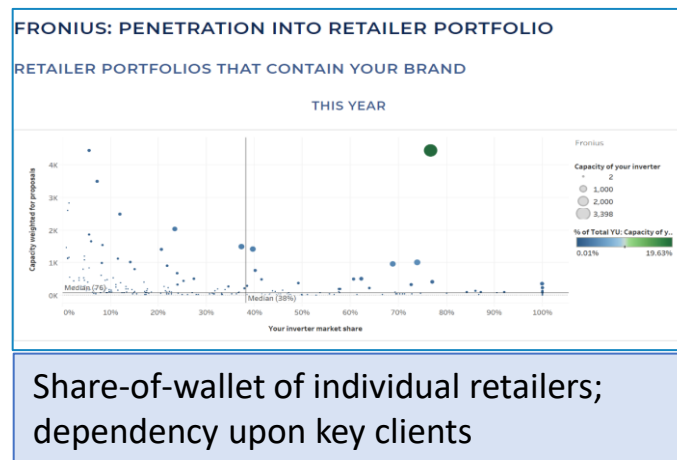
Determine who is stealing your market share

Charts revealing: for the combined set of retailers that use your brand, what portfolio of products do they use, and what trends in aggregated share-of-wallet is occurring.

Assess strengths and weaknesses of your brand, and your competitors

Charts revealing each manufacturer's dependency upon key clients

Charts identifying the locations & segments that are strongest and weakest for each brand.



Protect Market Share



Assess competitive brand strength by comparing customer growth / loyalty / churn

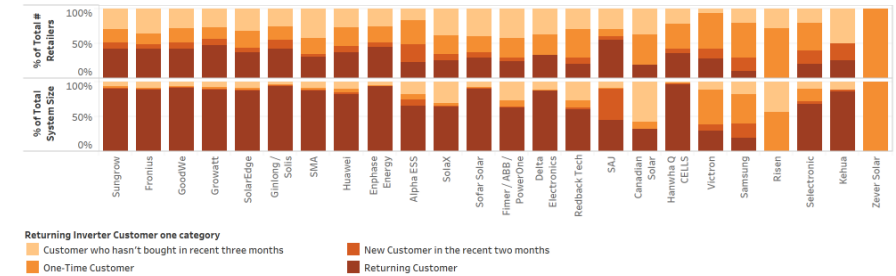
Charts revealing the percentage of capacity and customers that comes from new / loyal / churning retailers

Charts revealing the typical share-of-wallet for each brand, to identify which brands capture most of their clients' business

Brands that have greatest customer loyalty / churn / growth

CUSTOMER ACQUISITION AND CHURN

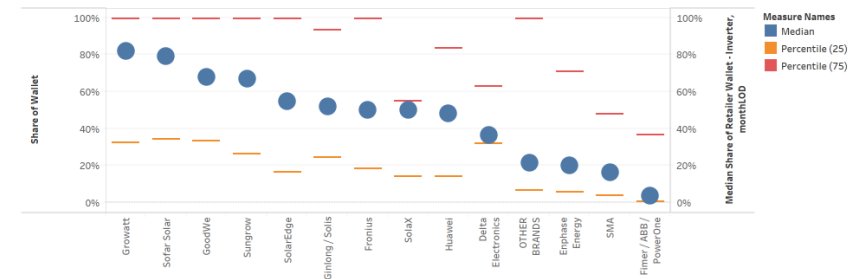
LAST 6 MONTHS



Brands that capture most of their customers' business

TYPICAL SHARE OF RETAILERS' WALLET BY INVERTER BRAND - COMPARISON

LAST 3 MONTHS



Improve Market Share

Grow Market Share (Enterprise Upgrade)



Improve share-of-wallet by engaging with key clients using your brand, or target those using your competitors' brands.

Interactive register of all known retailers with brands they market, with contact details.

Plus interactive company/business name register

INTERACTIVE REGISTRY

This registry contains a list of installers/retailers using the selected Inverter and Panel brand. Please wait for interactivity to load online if you have a Tableau licence (usage requires a licence).

Enterprise Upgrade

Step 1: Select Inverter Manufacturer
ANY

Step 2: Select Panel Manufacturer
ANY

Installers / Retailers using ANY Inverters and ANY Panels

Density of Installers using ANY Inverters and ANY Panels
Step 3: (Optionally drag an area to filter companies in that region)

List of Companies using ANY Inverters and ANY Panels
Step 4: (Optionally click to visit website or call phone)

Company	Website	Post Code	Phone	
3 Phase Solar Pty Ltd	www.3phasesolar.com.au	Null	+61 1800 274273	Abc
3 Way Electrical Services	http://www.3way.com.au	2077	+61 412 466100	Abc
3D Energy Pty Ltd	www.3denery.com.au	4051	+61 1300 880538	Abc
3P Solar	http://www.3psolar.com.au/	2015	+61 1300 378637	Abc
4 Front Services	https://www.4frontservices.com.au	7054	+61 3 628 79603	Abc
4E Electrical Services	http://www.4electricalservices.com/	4017	+61 4230 87897	Abc
4Shore Solar	http://4shoresolarelectrical.com.au	4220	+61 450 801985	Abc
5B Australia Pty Ltd	https://5b.com.au	2015	Null	Abc
5th Star Pty Ltd	http://www.5thstarservices.com.au/	Null	+61 1300 038665	Abc
6 Star Electrical	https://www.6starelectrical.com/	0714	+61 455 559675	Abc
7E Integrated Services	7e.net.au/	2320	+61 421 517243	Abc
12 Volt Guy	https://www.12voltguy.com.au	Null	+61 438 777737	Abc
13Trade	http://www.13trade.com/	2611	+61 1800 676696	Abc
24 Hour Emergency Electrician Sydney	www.24houremergencyelectriciansydney.com.au	2038	+61 428 158086	Abc
24 Hour Solar Power	http://www.24hoursolarpower.com/	2480	+61 1300 244251	Abc
24/7 Solar & Battery	https://www.247solarbattery.com/	Null	+61 428 679300	Abc
100 PowerLink	https://www.100powerlink.com.au/	2120	+61 1300 995221	Abc
100% Electrics	http://100percentelectrics.com.au	Null	+61 400 500022	Abc
240 Electrical Pty Ltd	240electrical.com.au/	4053	+61 7 3352788	Abc
247 Energy	www.247e.com.au	Null	+61 4 48113882	Abc
360Utilities	https://www.360utilities.com.au/	3121	+61 1300 600121	Abc
365 Solar Australia	365solar.com.au	3048	+61 1300 365765	Abc
888 Electrical Solutions	https://888electricalsolutions.com.au/	4157	+61 1300 088853	Abc
888 Solar Tek	https://888solartek.com.au	2480	+61 2 66884480	Abc
999 Electrical	www.999electrical.com.au	6155	+61 412 907276	Abc
4670 Electrical	http://www.4670electrical.com.au	4670	+61 405 587630	Abc
A Grade Electrical	https://www.agradeelectrical.net.au/	4500	+61 7 32052139	Abc

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Interactive register of retailers by brand & location with contacts

Plan Weeks & Years Ahead

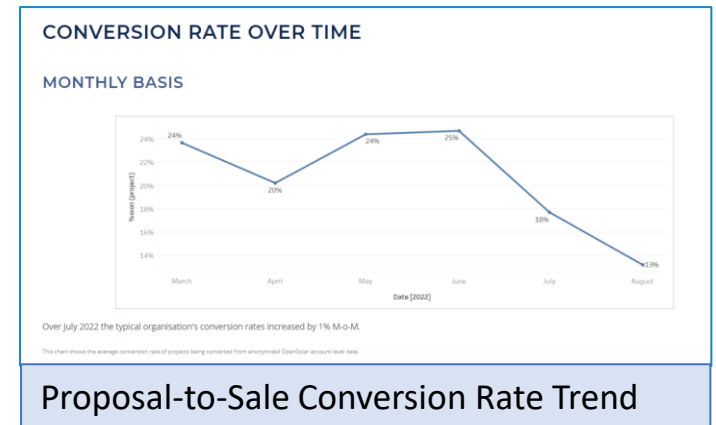
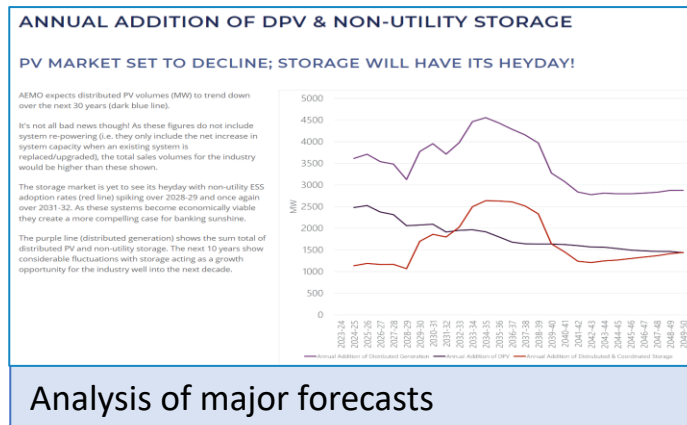
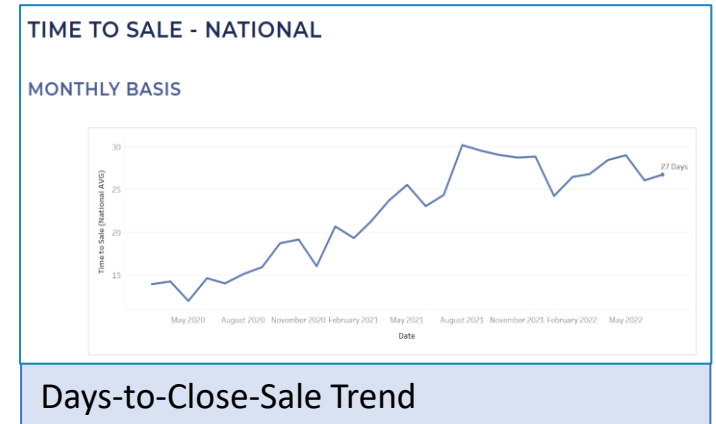
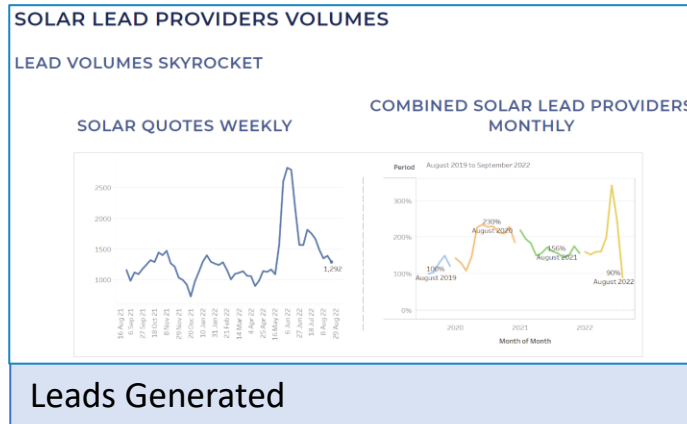


Know how much stock to order in the short & medium term, and what to plan for long-term.

Recent installation trends help you assess what's to come.

Better inform your 3-month projection with lead generation activity, indexes on conversion rate, and days-to-close-sale.

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



Forecast Product Demand (Enterprise Upgrade)

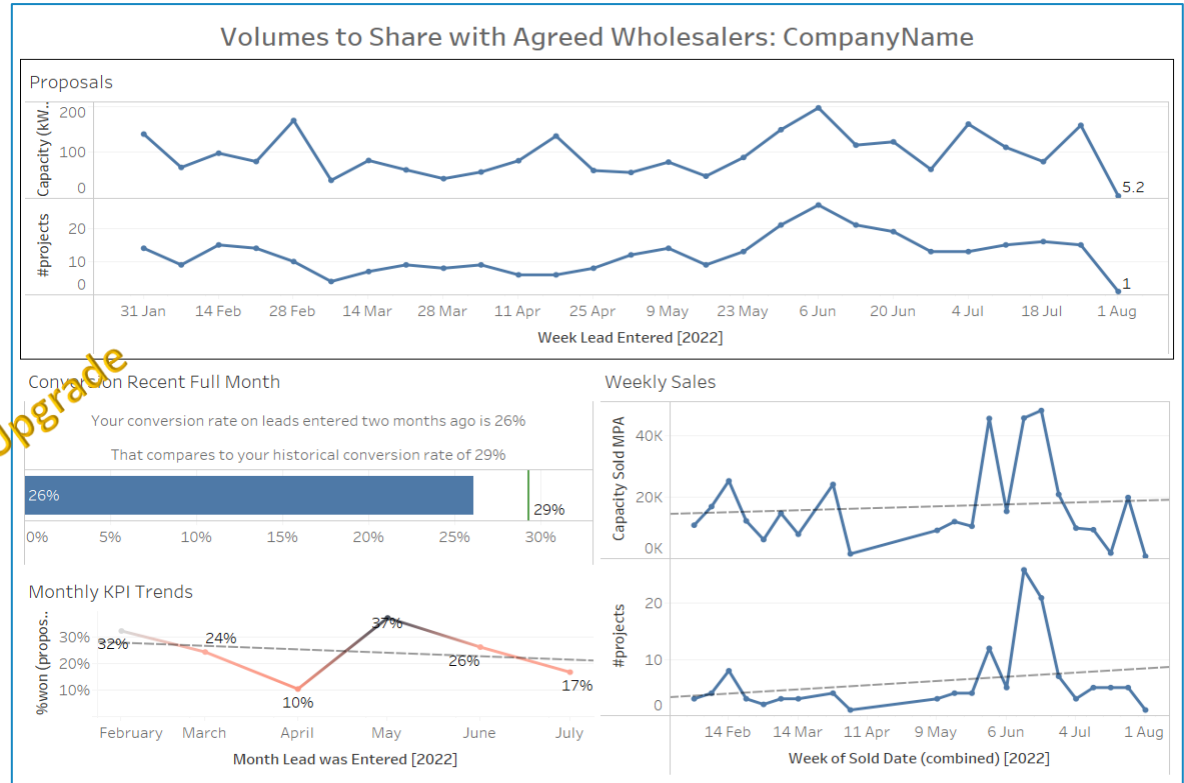


Retailers can opt-in to automatically sharing their forward order projections with you

Speak with us about automatically receiving forward-order volumes from individual retailers (on an opt-in basis)

Capacity Proposed		31..	7F..	14..	21..	28..	7M..	14..	21..	28..	4A..	11..	18..	25..	2..	9M..	16..	23..	30..	6J..	13..	20..	27..	4J..	11..	18..	25..	1A..	
Inverter..	Inverter..																												
Enphase	18 x IQ7..																					6.6							
	25 x IQ7..													10.2								6.6							
	27 x IQ7..																												
	27 x IQ7..																												
	28 x IQ7..																												
	36 x IQ7..																												
FIMER (S..	1 x UNO..																												
FIMER (S..	1 x UNO..																												
FIMER/	1 x UNO..																												
ABB	1 x UNO..																												
	3 x UNO..																												
Fronius	1 x Primo..																												
	1 x Primo..																												
	1 x Primo..	13.3																											
	1 x Primo..																												
	1 x Primo..	20.6																											
	1 x Primo..																												
	1 x Symo..																												
	1 x Symo..	11.1																											
	1 x Symo..																												

Product-level forward-orders



Individual Retailer's Proposal & Sale Volumes (opt-in basis)

Enterprise Upgrade

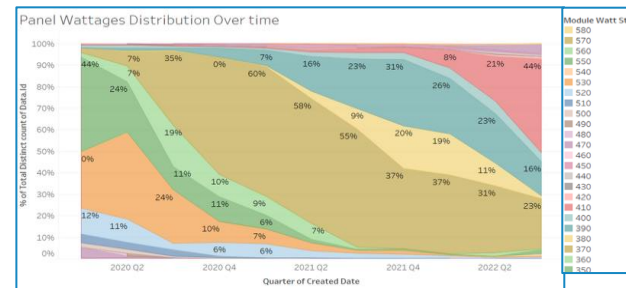
Meet Customer Demand Sizes



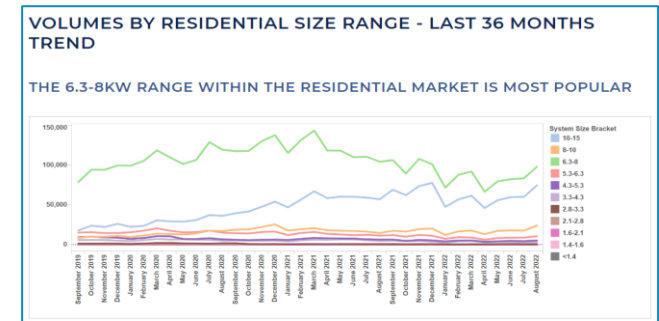
Track which sizes are in demand to offer products that match your customers' needs

Charts Revealing:

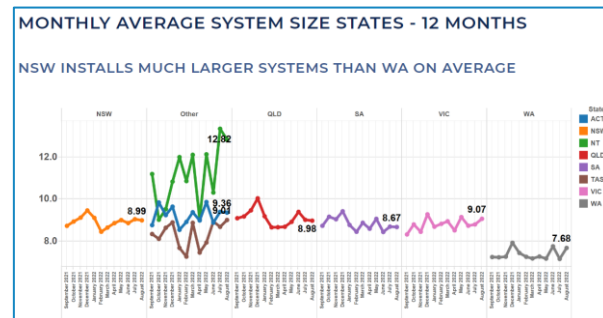
- PV System Size Average & Distribution
- Panel Electrical & Physical Characteristics
- ESS Average System Size nationally
 - *Enterprise Upgrade includes further details on ESS distribution & relationship between ESS & PV sizing.*



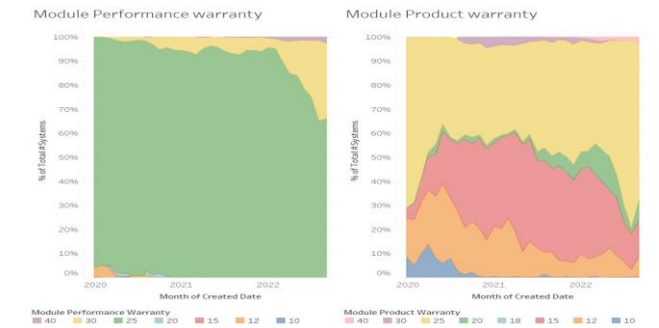
Panel wattage distribution over time



Distribution by system capacity over time



Average system size by state



Trends in Panel Warranty

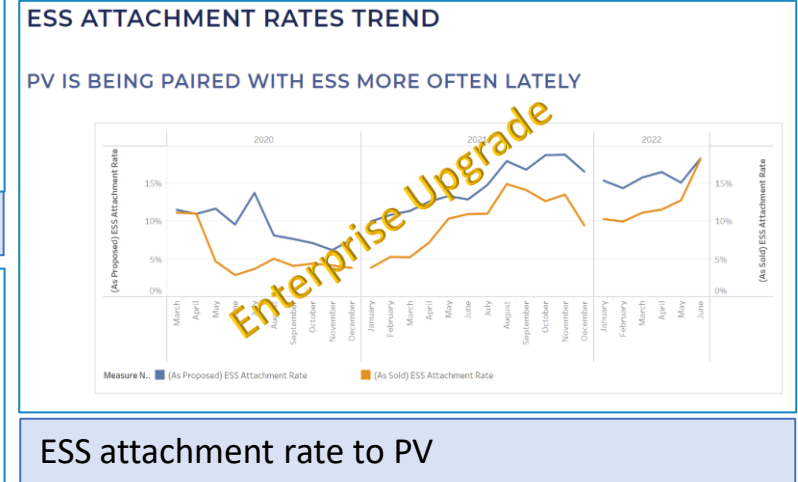
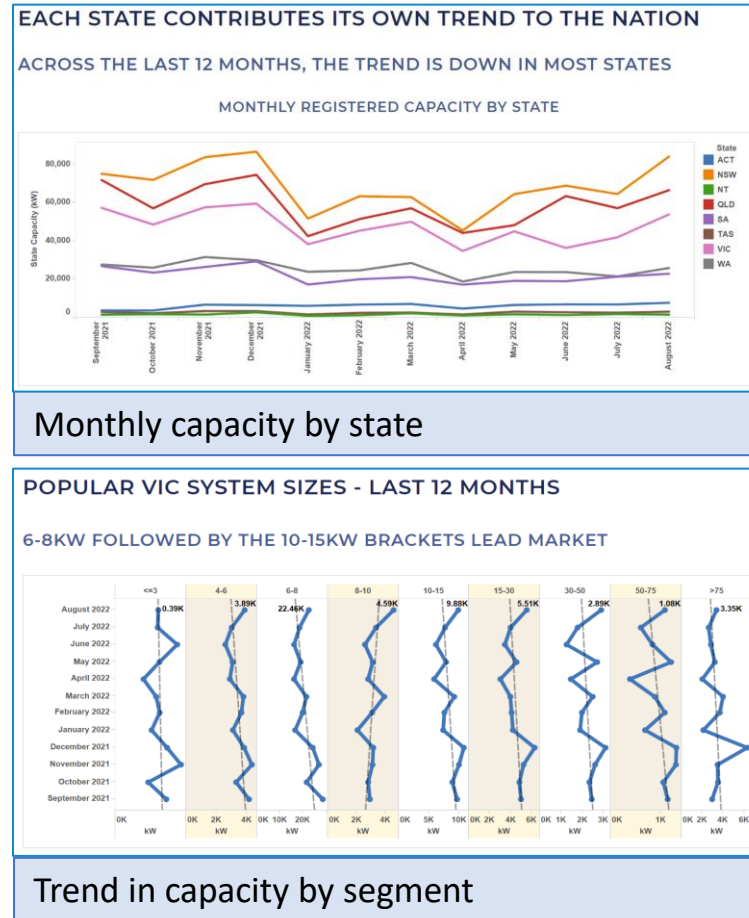
What To Focus On



Concentrate on the best segments & states & technologies & locations to target, so your business maximises its impact. Evaluate adjacent markets too.

Charts Revealing: Trend in capacity by state, trend in capacity by segment.

Enterprise upgrade includes trend in ESS-to-PV attachment rates.



Price Optimally

Understand Your Brand's Price Premium



Understand the premium your brand fetches on the market

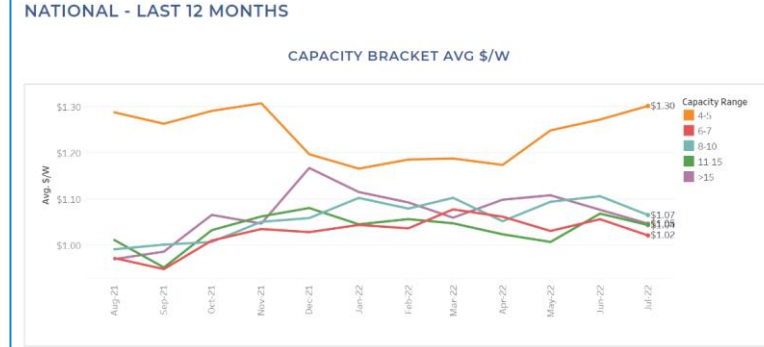
Charts on system pricing nationally and by state, for a range of panels, inverters, and system sizes. Plus charts in pricing trends nationally, by state, and by system size range.



Typical panel pricing distribution used within a 6.6KW system. Typical panel pricing distribution used within a 10KW system.

Range of Pricing by Panel brand

\$/W PRICING TREND



Pricing Trends

COMBINATION PRICING (\$/W) - 6.6KW

INVERTER & PANEL

NATIONAL PRICING DISTRIBUTION

Inverter Class	Inverter Brand (group)	Panel Brand	JA Solar	Trinax	Lamp	Hanwha Q Cells	REC	SunPower	Hyundai	Sungor	Percentile (25) of \$/W	Median \$/W	Percentile (75) of \$/W	
Leading Chinese	GoodWe	Percentile (25) of \$/W	\$0.45	\$0.70	\$0.67	\$0.43	\$0.70				\$0.43	\$0.70	\$1.10	
		Median \$/W	\$0.51	\$0.90	\$0.81	\$0.63	\$0.83					\$0.51	\$0.90	\$1.10
		Percentile (75) of \$/W	\$0.68	\$1.11	\$0.90	\$0.80	\$0.95					\$0.68	\$1.11	\$1.70
Sungrow	Percentile (25) of \$/W	\$0.59	\$1.21	\$0.90	\$0.79	\$0.81			\$0.67		\$0.59	\$1.21	\$1.70	
		Median \$/W	\$0.66	\$1.73	\$0.96	\$0.83	\$0.95			\$0.66		\$0.66	\$1.73	\$1.70
		Percentile (75) of \$/W	\$0.95	\$2.05	\$1.20	\$0.94	\$0.97			\$1.00		\$0.95	\$2.05	\$2.70
Ginlong Solar	Percentile (25) of \$/W										\$1.34	\$1.30	\$1.92	
		Median \$/W										\$1.34	\$1.30	\$1.92
		Percentile (75) of \$/W										\$1.34	\$1.30	\$1.92
European	SMA	Percentile (25) of \$/W				\$0.69					\$0.69	\$0.80	\$1.00	
		Median \$/W				\$0.80					\$0.80	\$1.00	\$1.00	
		Percentile (75) of \$/W				\$1.00					\$1.00	\$1.00	\$1.00	
Premium	Percentile (25) of \$/W	\$0.94	\$0.75	\$0.95	\$0.90	\$1.05	\$0.95	\$1.00	\$1.10	\$1.10	\$0.94	\$1.05	\$1.30	
		Median \$/W	\$1.73	\$0.80	\$0.96	\$1.20	\$1.07	\$1.03	\$1.40	\$1.20	\$1.16	\$1.73	\$1.30	
		Percentile (75) of \$/W	\$1.38	\$1.00	\$1.07	\$1.42	\$1.10	\$1.11	\$1.45	\$1.20	\$1.17	\$1.38	\$1.45	
NLEPE	SolarEdge	Percentile (25) of \$/W				\$1.20					\$1.20	\$1.26	\$1.60	
		Median \$/W				\$1.26					\$1.26	\$1.26	\$1.60	
		Percentile (75) of \$/W				\$1.60					\$1.60	\$1.60	\$1.60	
Enphase	Percentile (25) of \$/W					\$1.45		\$1.70			\$1.45	\$1.70	\$2.00	
		Median \$/W				\$1.71		\$1.70			\$1.71	\$1.70	\$2.00	
		Percentile (75) of \$/W				\$2.00		\$2.00			\$2.00	\$2.00	\$2.00	

Range of pricing by panel & inverter combination

Uncover Trends in Wholesale Prices

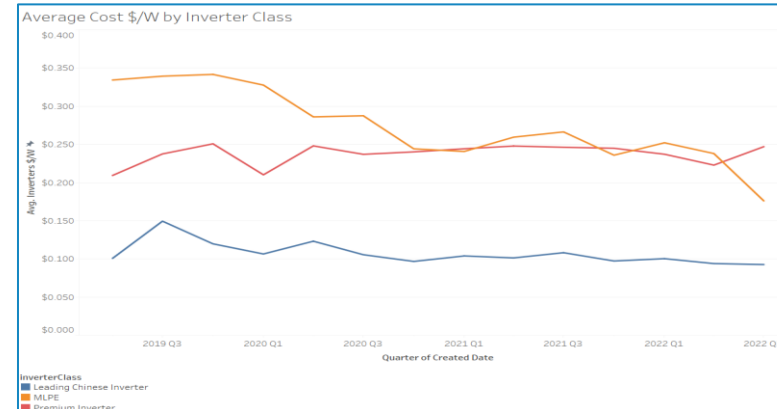


Understand trends in wholesale prices

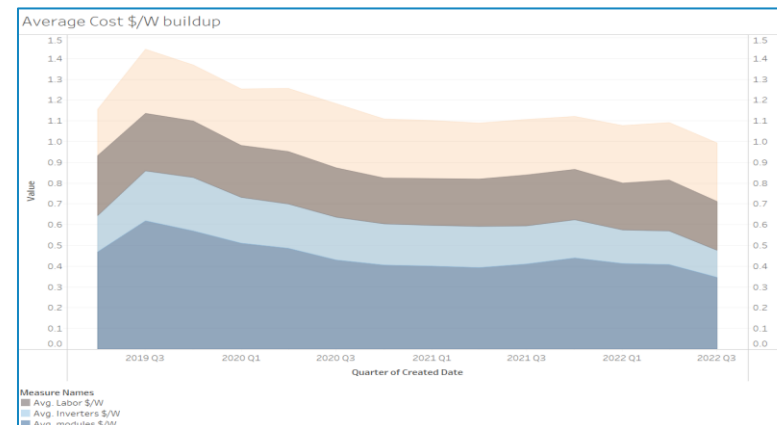
Charts on panel / inverter costs by equipment charts, plus breakdown of system cost by component.

Trend in wholesale prices based upon published pricelists.

Coming soon: Wafer & Module price trends



Trend in panel cost by equipment class



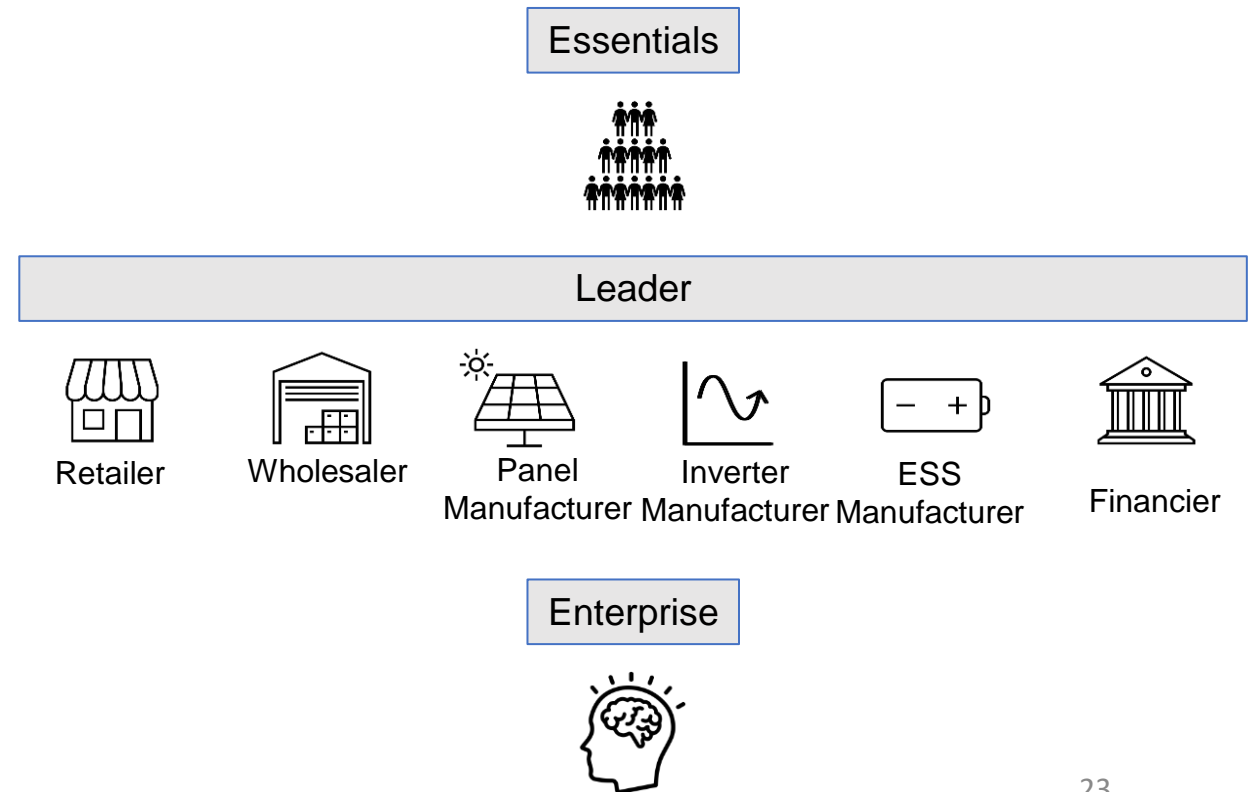
Trend in system cost component breakdown

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

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