

**SunWiz Market Analytics:  
The Luminare Intel Platform  
- Wholesalers -**

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



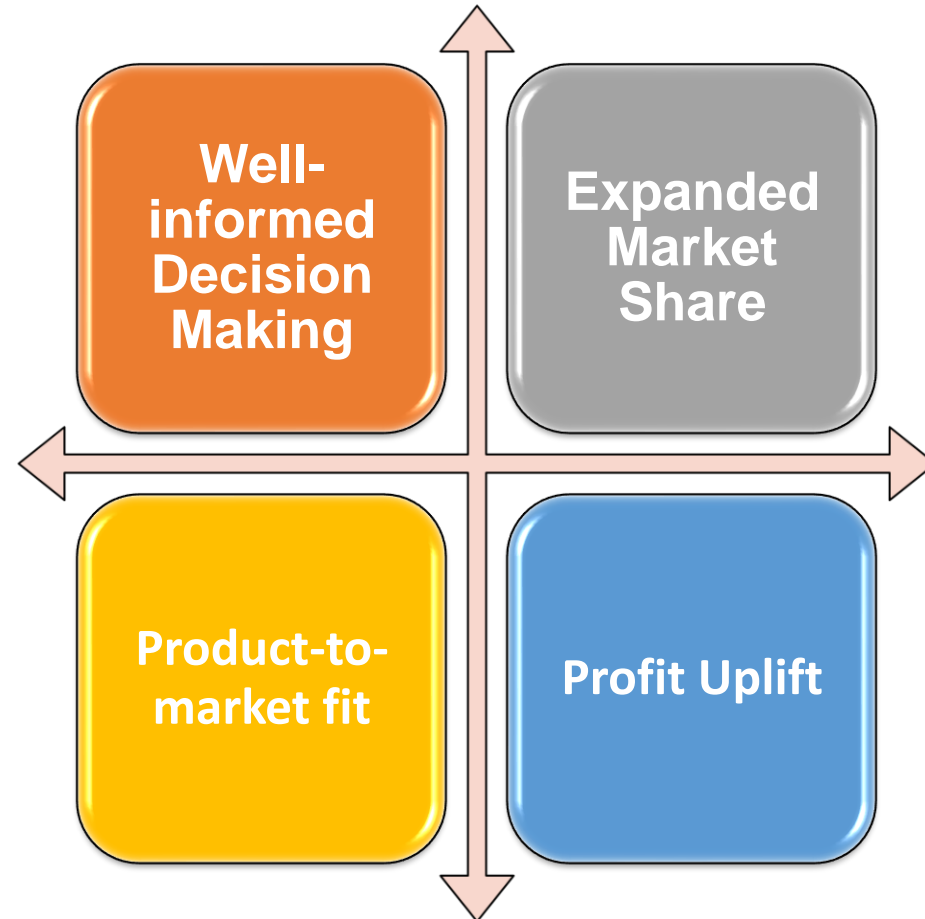
**Our data is integral to critical decisions made by ESS & PV Manufacturers, Wholesalers, Distributors, Solar Installers & Government Agencies**

"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 Luminare:

# Outcomes Luminare Delivers



## Improve Market Share

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



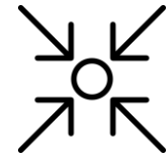
## Price Optimally

- 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 Luminare 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

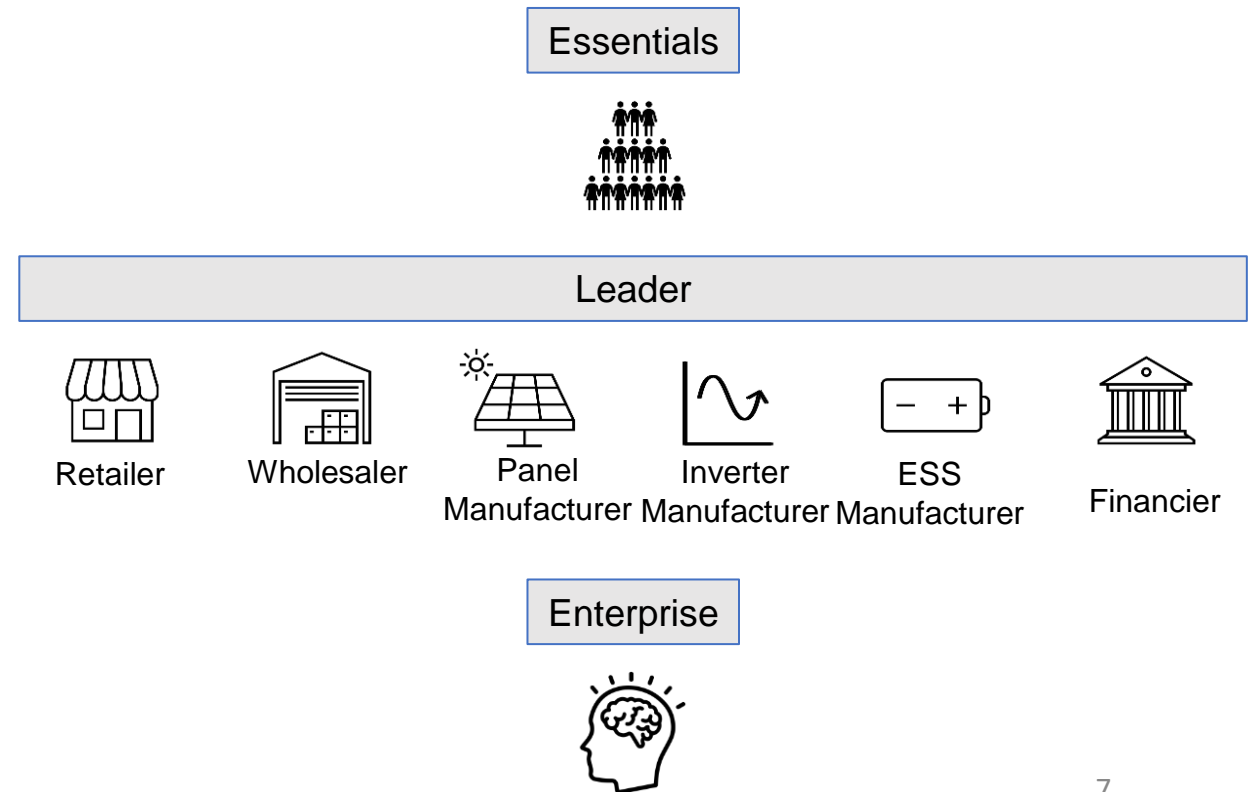
	Essentials	Leader	Enterprise
	<b>The must-know content to not fall behind</b>	<b>A bundle of information designed for your market segment</b>	<b>Everything you need to know to understand and dominate the industry</b>
Users included	5	10	20
Interactive users	0	1	3
Subscriber-only Webinar Access			
Personal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



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# Volumes & Sizes



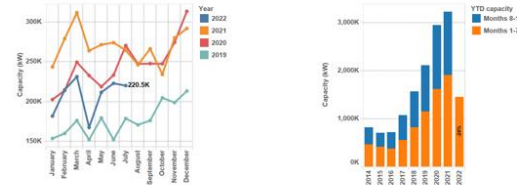
Don't get left behind, with weekly and monthly updates on key trends in the market as they evolve.

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



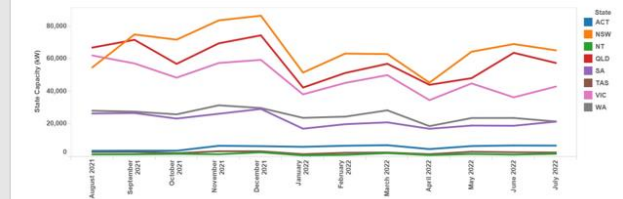
The 220MW recorded in July 2022 is still below volumes observed at the same time in 2020. Volumes are back up to what was seen over Feb / March.

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



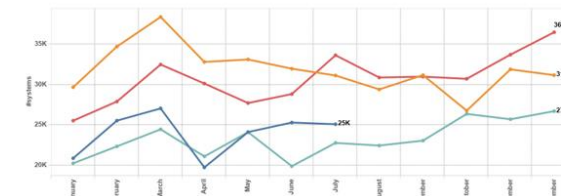
Of the major states, only VIC and SA increased in volumes whereas NSW, QLD and WA fell. In percentage terms, the increase was greatest in VIC (1.8%) and the decrease greatest in QLD (1.1%).

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

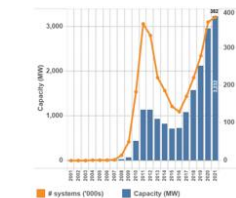
LAST 4 YEARS



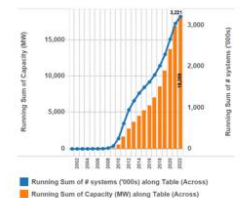
## ANNUAL VOLUMES OF SUB-100KW INSTALLATIONS

NATIONAL REGISTRATION TALLIES

ANNUAL REGISTRATION TALLY



CUMULATIVE TALLY



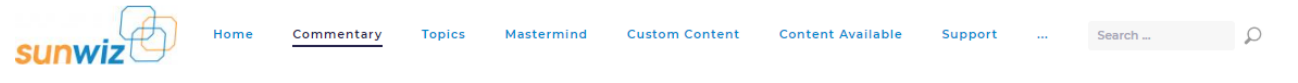
# Report to Investors



**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](#)

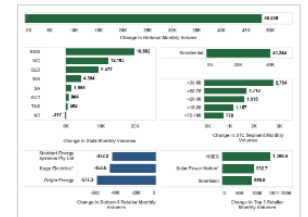
### 2022-09 STC MARKET UPDATE & EXEC SUMMARY

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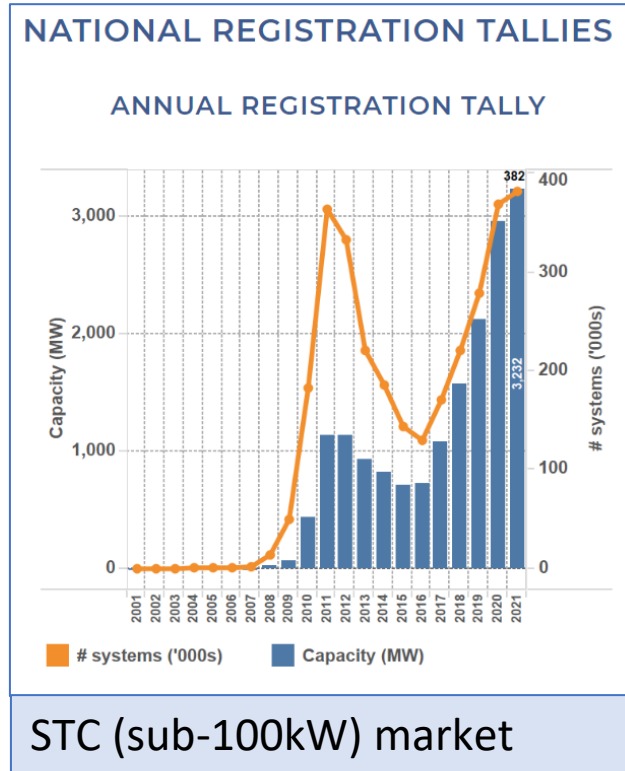
### 2022-08 MID MONTH UPDATE INCLUDING LUMINATE ESSENTIALS LONG-FORM REPORT

# Evaluate Market Share

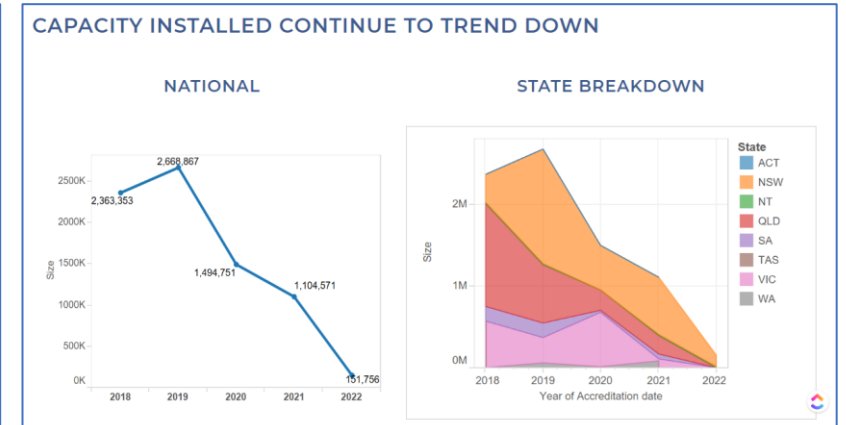


Get instant feedback on your performance by calculating your market share

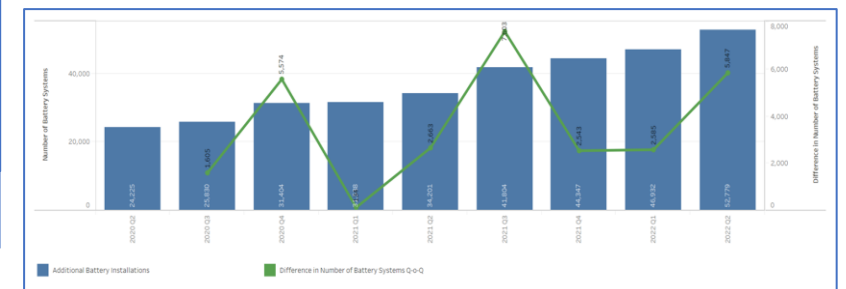
Charts cover market volume for the PV and ESS Markets annually & sub-annually, nationally & by state, by size range.



STC (sub-100kW) market



LGC Market



ESS Market

Improve Market Share

# Grow Market Share

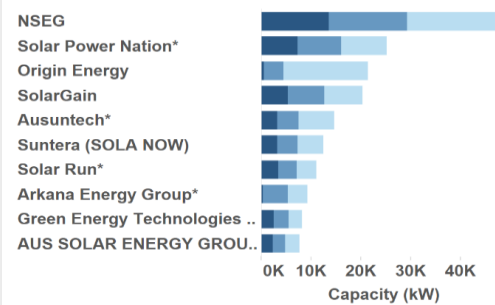


Grow your market share by identifying key PV Retailers & calculating your Share-of-Wallet

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

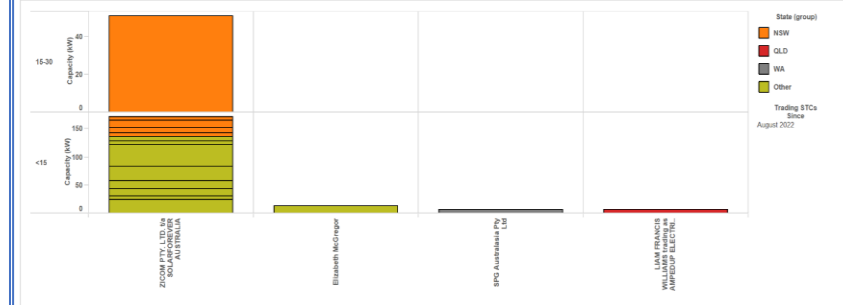
## RANKING BY QUARTER

VOLUME REGISTERED RANKING



## LAST 2 MONTHS

TRADING STCS



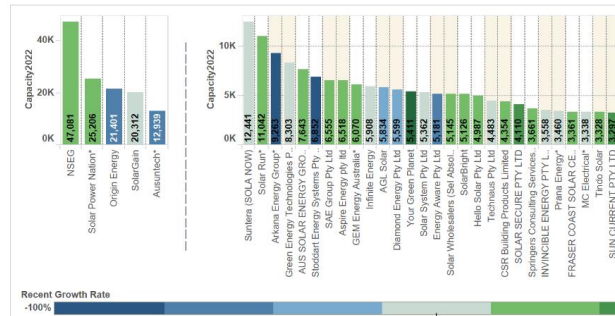
## Top Retailers

## New Retailers

## TOP 50 RETAILERS

RANKING & GROWTH RATE - RECENT MONTHS

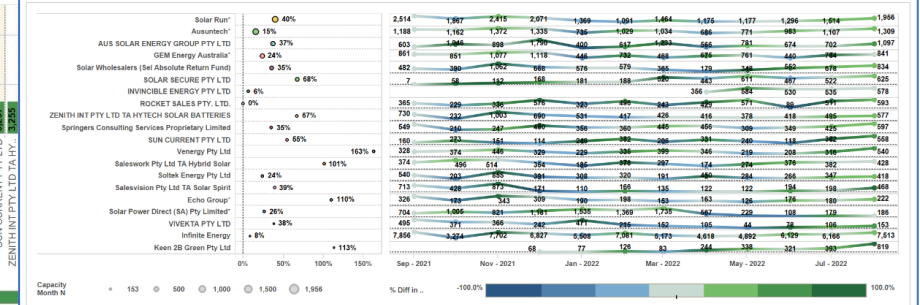
VOLUME REGISTERED RANKING



## TOP 20 GROWTH COMPANIES

LAST 12 MONTHS

VOLUME & GROWTH RATE



## Large Retailers

## High-Growth Retailers

Improve Market Share

# Grow Market Share



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).

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.4eelectricalservices.com/	4017	+61 4230 87887	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 13552788	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 888353	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	+61 408 587630	Abc
A Grade Electrical	https://www.agradeelectrical.net.au/	4500	+61 7 32052139	Abc

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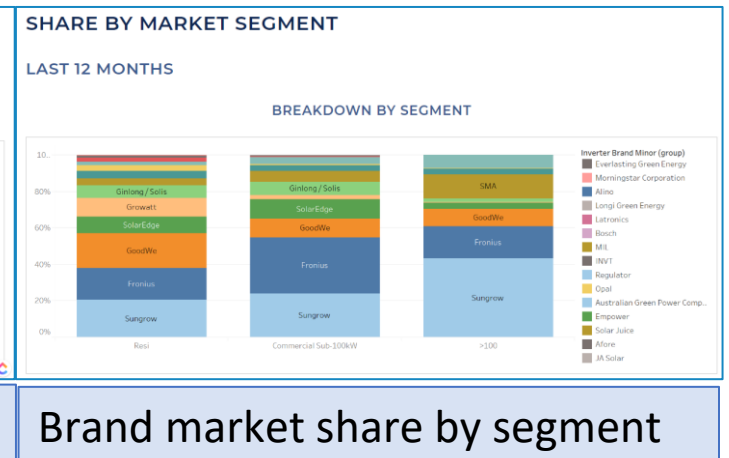
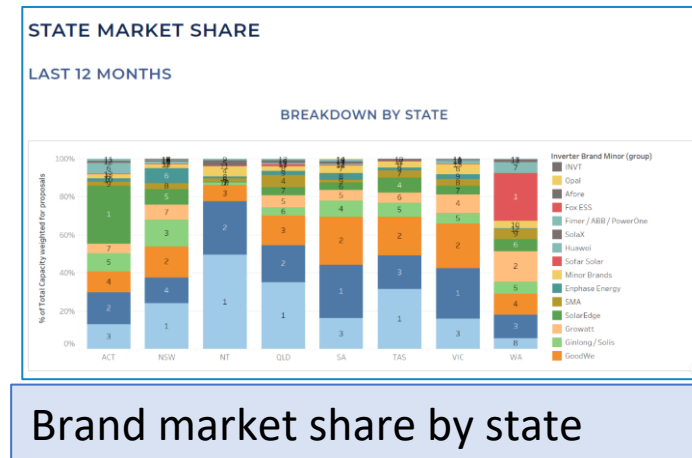
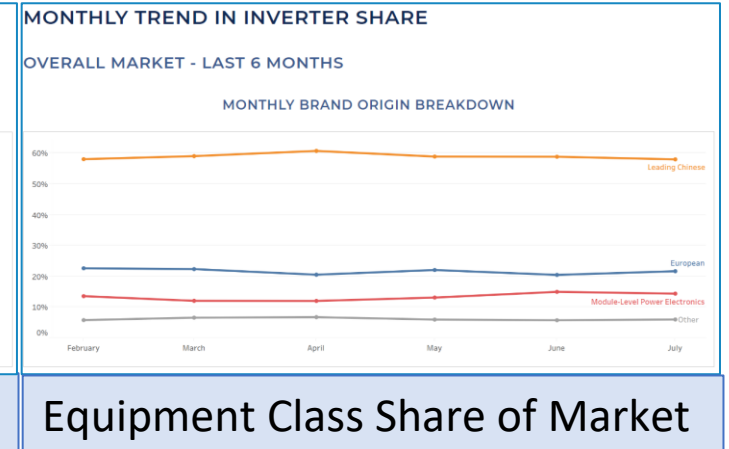
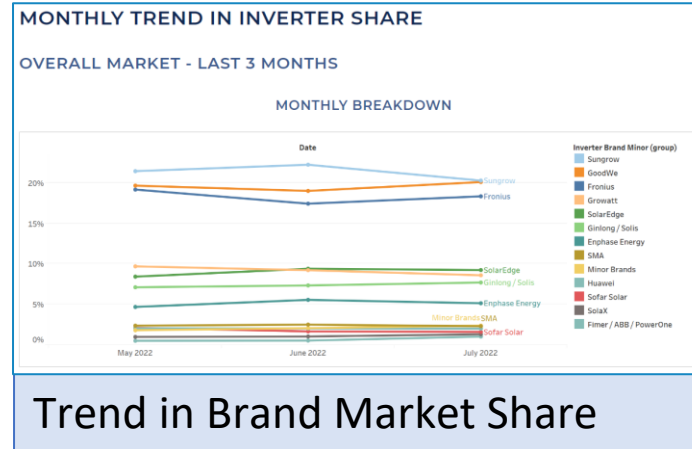
Interactive register of retailers by brand & location with contacts

# Grow Market Share



Track your share-of-brand to reveal if your strategy is working, and evaluate alternative brands

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



# Plan Weeks & Years Ahead

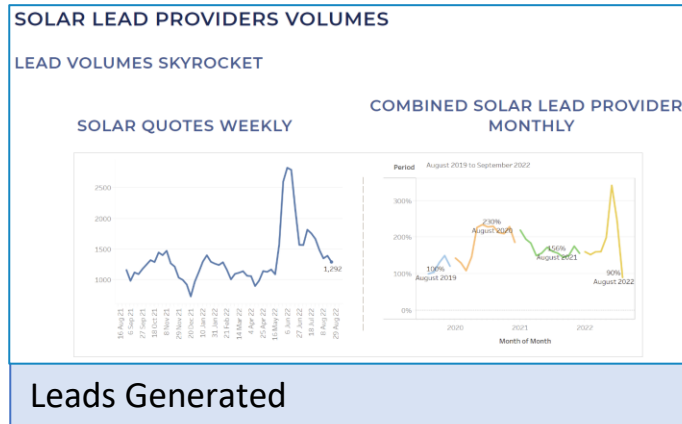


**Know how much stock to order in the short & medium term, and what to plan for long-term.**

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

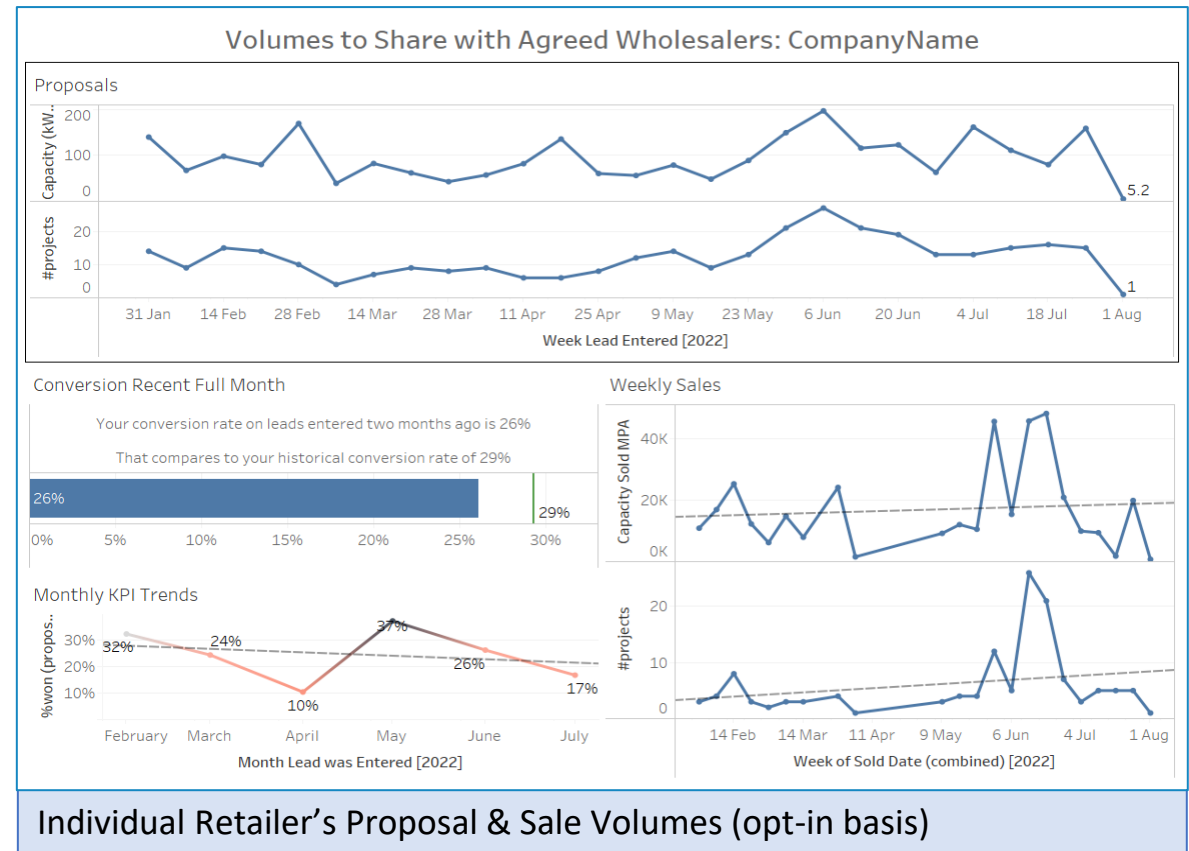


## Wholesalers: Retailers can opt-in to automatically sharing their forward order projections with you

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	16 x IQ7..																												
	18 x IQ7..																												
	25 x IQ7..																												
	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..																												
	1 x Symo..																												

Product-level forward-orders



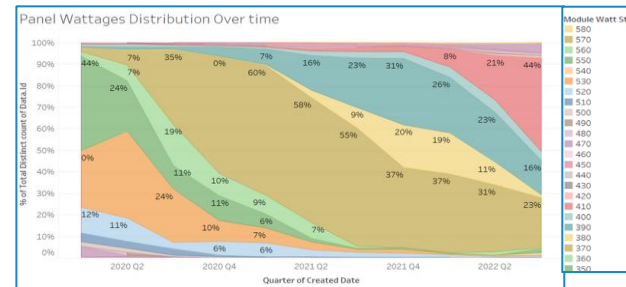
# Meet Customer Demand Sizes



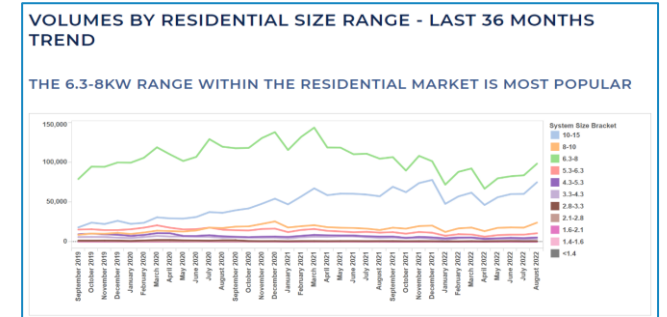
Track which sizes are in demand to offer products that match your customers' needs

Charts Revealing:

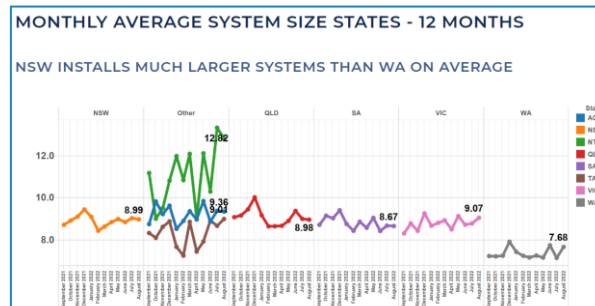
- System Size Average & Distribution (ESS & PV)
- Wattage of Panels and Inverters



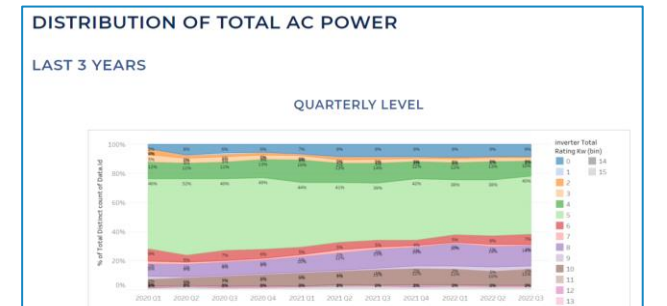
Panel wattage distribution over time



Distribution by system capacity over time



Average system size by state



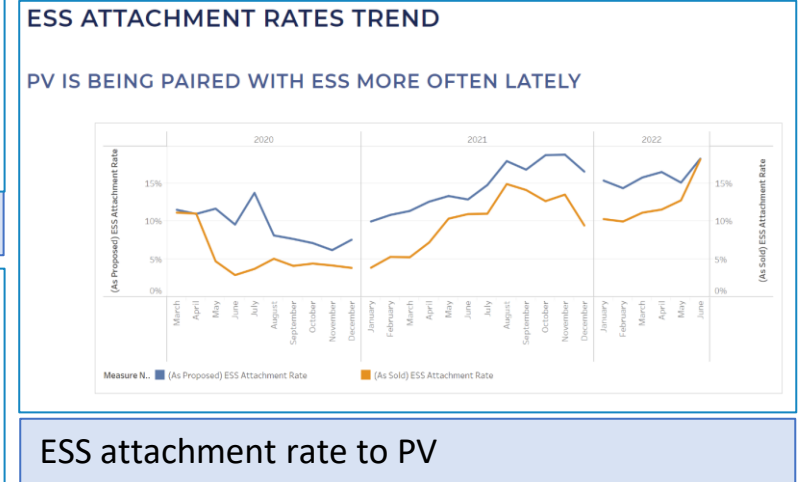
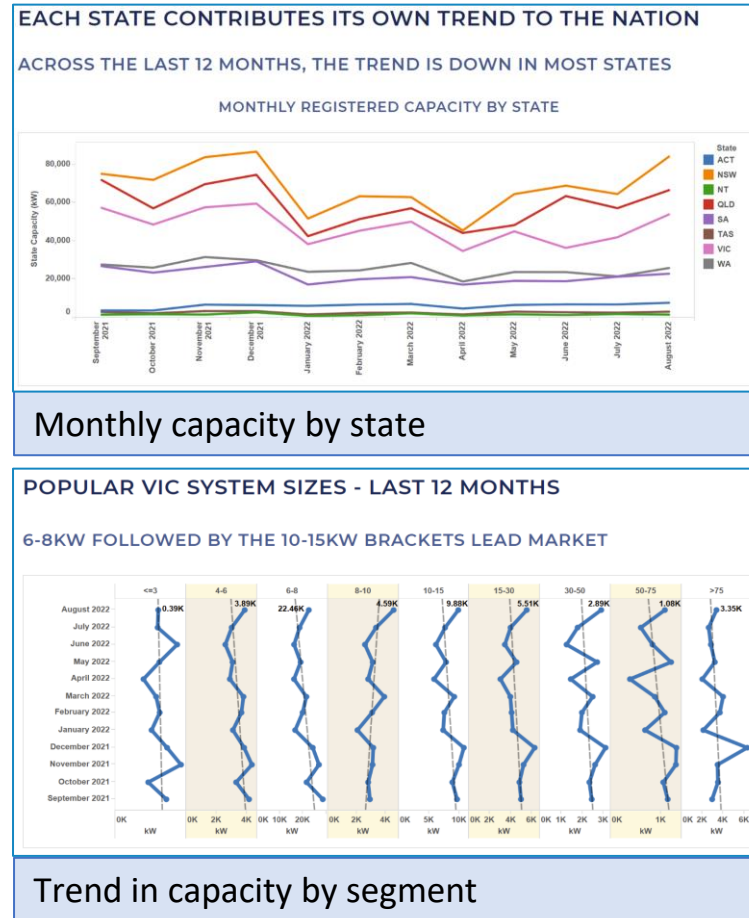
Distribution of inverter AC capacity

# 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, trend in ESS-to-PV attachment rates.



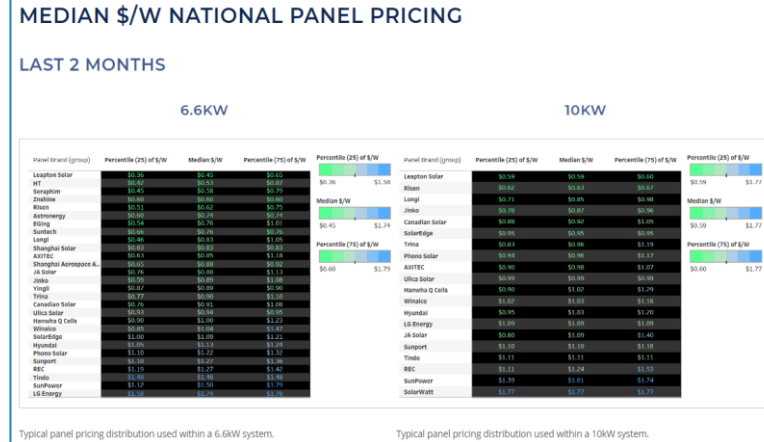
Price Optimally

# Understand Your Brands' Price Premium



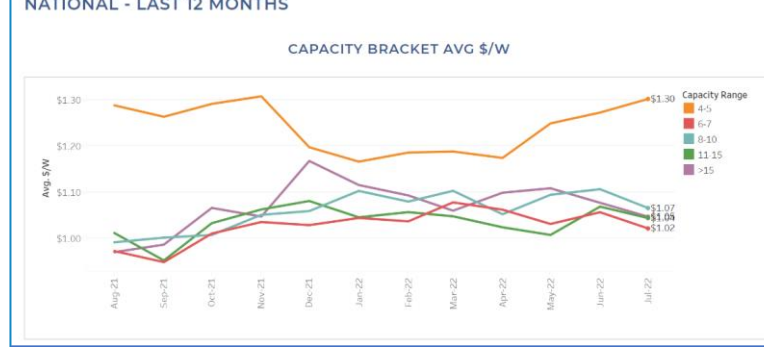
**Wholesalers: Understand the premium each of your brands fetch on the market**

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



Pricing Trends

## COMBINATION PRICING (\$/W) - 6.6KW

### INVERTER & PANEL



Range of pricing by panel & inverter combination

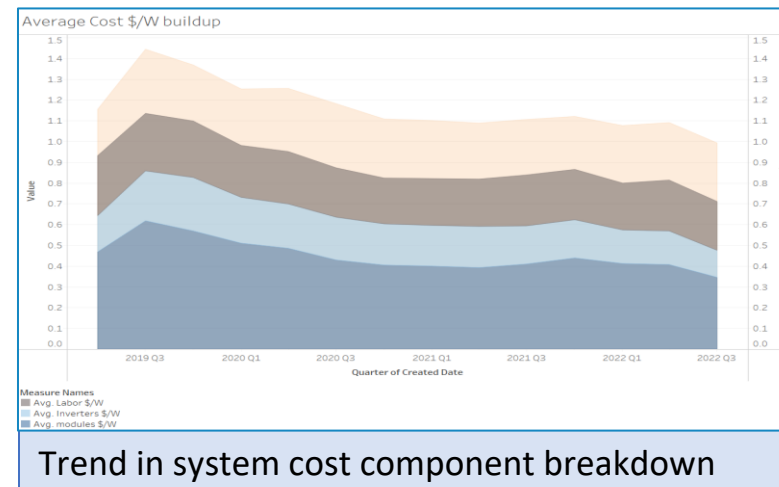
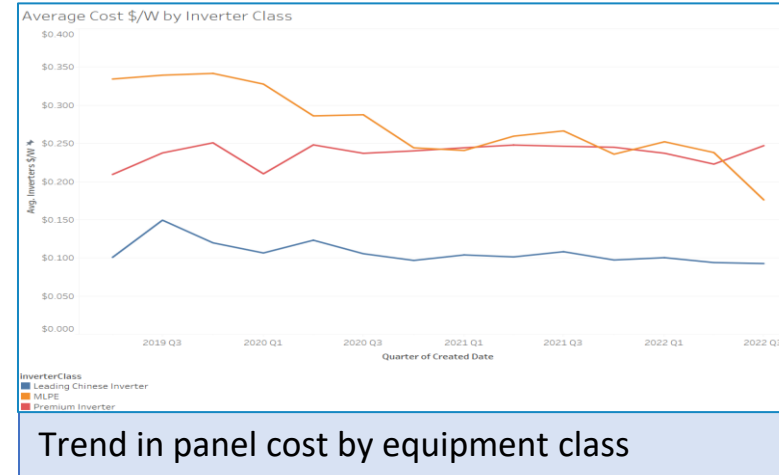
# Uncover Trends in Wholesale Prices



## Wholesalers: visualise 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.



# Target Locations Most Likely to Buy



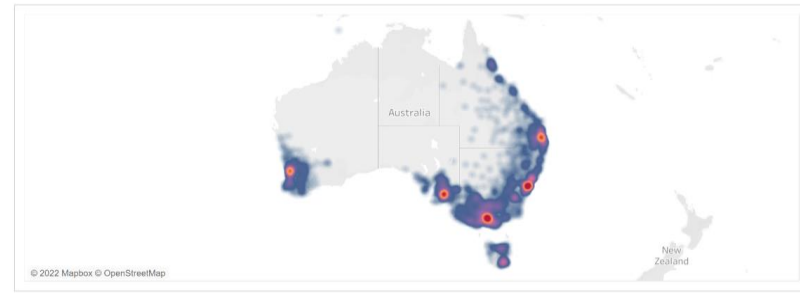
**Wholesalers: Place distribution centres close to where the customers are**

Charts showing the top postcodes to target nationally, by state, and by system size range

Retailers can also discover their own best postcodes with Inner Vision

## BATTERY NATIONAL DENSITY MAP - ALL TIME

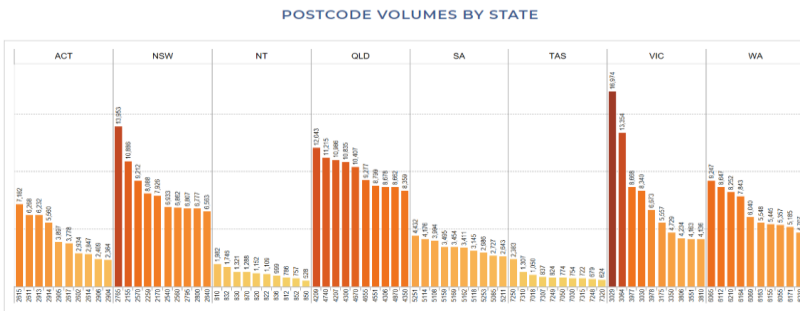
MAJOR CITIES REMAIN THE MOST POPULAR CHOICES FOR BATTERY INSTALLATIONS.



### Top Locations for Battery Sales

## TOP 10 POSTCODES BY STATE

LAST 12 MONTHS

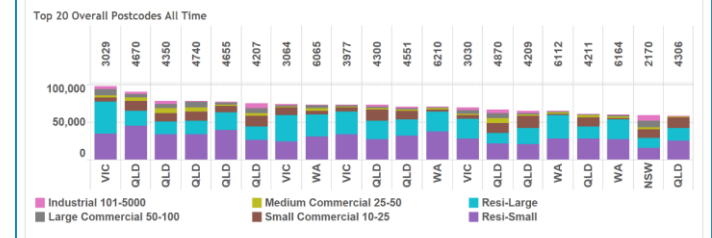


### Top Locations for PV sales

## TOP 20 POSTCODES BY STATE & SEGMENT

ALL-TIME

POSTCODE VOLUMES BY STATE



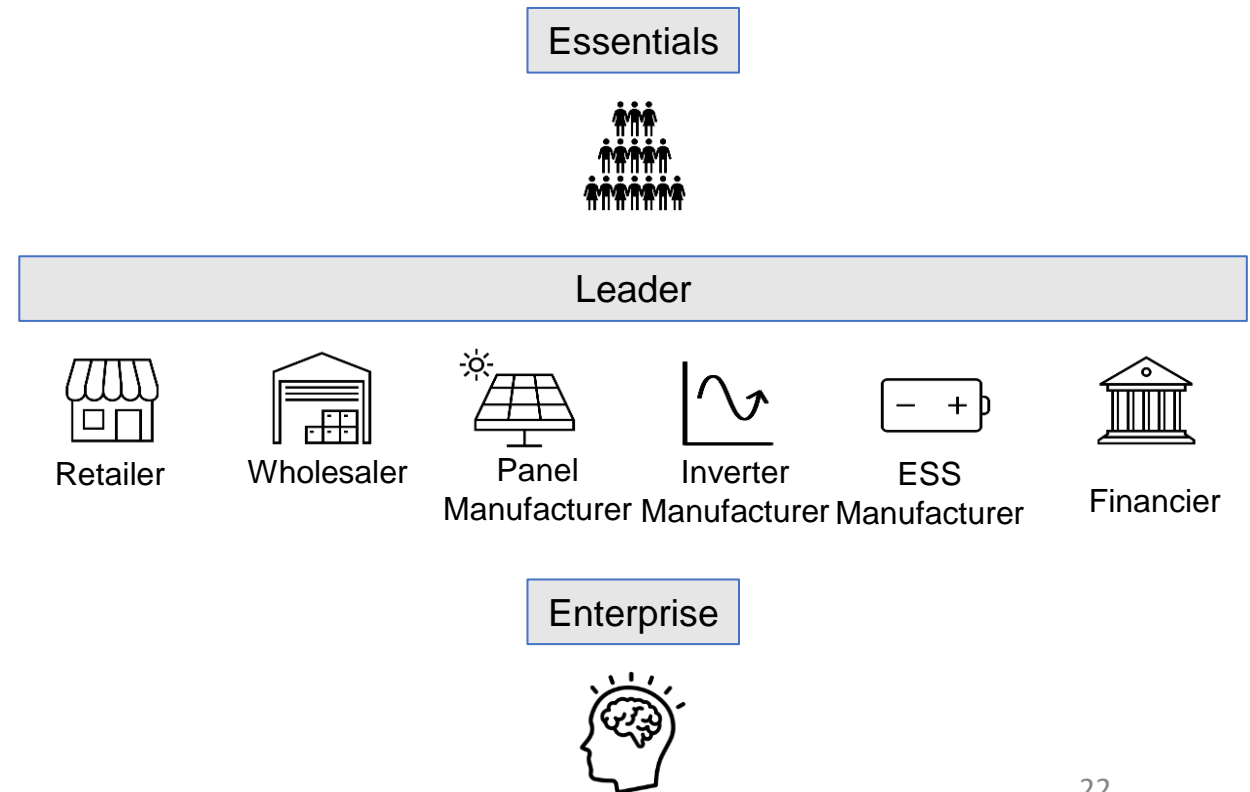
### Top Locations for PV sales of various sizes

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