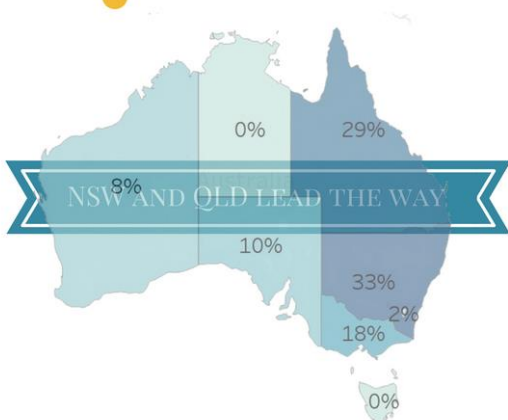


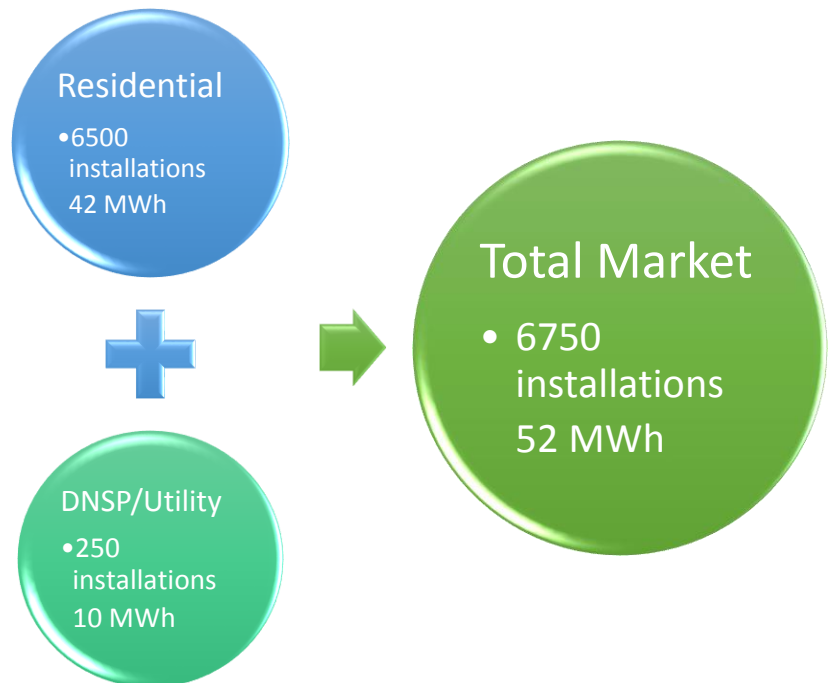
2016 AUSTRALIAN BATTERY MARKET

70%
of solar
customers
want batteries

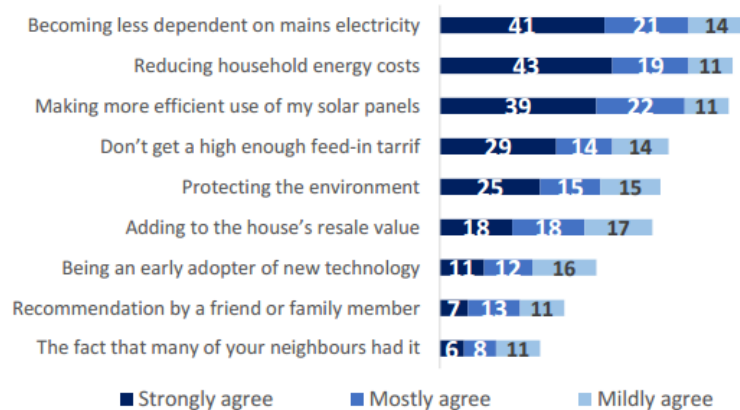


Australian Installation Tally

- INTERVIEWS SAY:
- Manufacturers: at least 7400 sales to wholesalers, though this figure doesn't include sales from all manufacturers, based on data from ~10 manufacturers
- Wholesalers: at least 3400 installations (from 4 wholesalers)
- Retailers: at least 726 installs (from 44 interviews)
- Projects: 325 installs
- Survey: a median of 6500 installations
- Forecasters: GTM 6700, Morgan Stanley 100k
- SunWiz's RECKONING:
- Residential volumes (outside of DNSP programs): 6500 installations totalling 42 MWh
- DNSP/Commercial: 250 additional installations totalling 10MWh
- Total market for 2016: 6750 installations totalling 52MWh

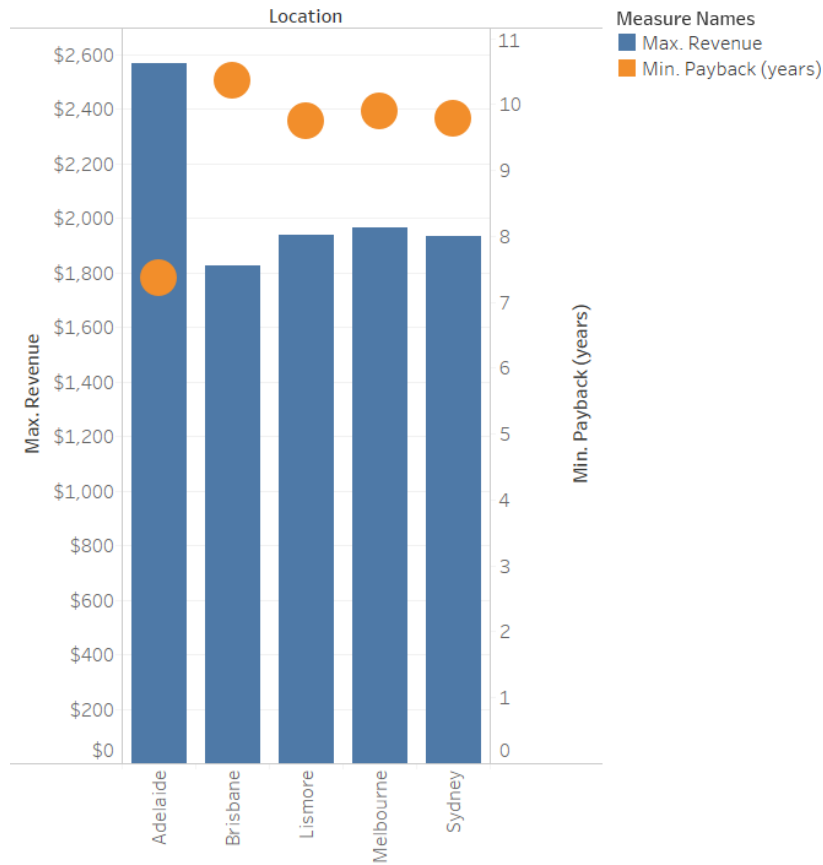


Why do they want batteries



- ECA commissioned research on usage of solar electricity in the NEM, part of which was about batteries. There's some great research on solar motivations in here:
<http://www.energyconsumersaustralia.com.au/documents/UMR-Usage-of-solar-electricity-in-the-national-energy-market.pdf>
- The chart to the right shows the motivations for considering batteries – with the leading answers
 - Energy Independence
 - Reducing Bills
 - Making better use of solar panels

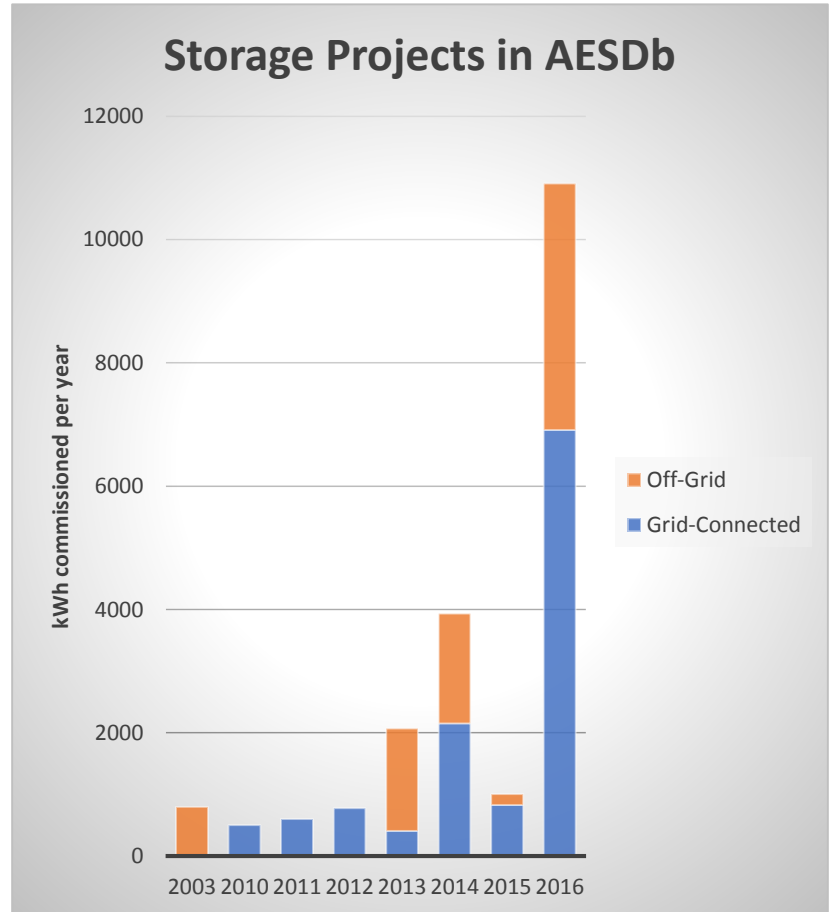
Australian Paybacks



- This analysis shows the results of PVsell modelling 5kW of PV with a PowerWall 2 on standard tariffs across the country, against a customer with a (very high) 25kWh/day consumption level.
- Though you can't convince your customers to move states just to get a better battery deal, national PV/storage retailers can target their efforts to the best location
- Customers in Adelaide are fortunate to have the quickest payback on a PV-storage system – driven by high electricity prices and plenty of sunshine.
- Customers in Brisbane are least well-off, because of low electricity prices.
- Much of the rest of the country has a 10 year payback if the
- Of course, the solar power does the heavy lifting when it comes to the revenue creation.

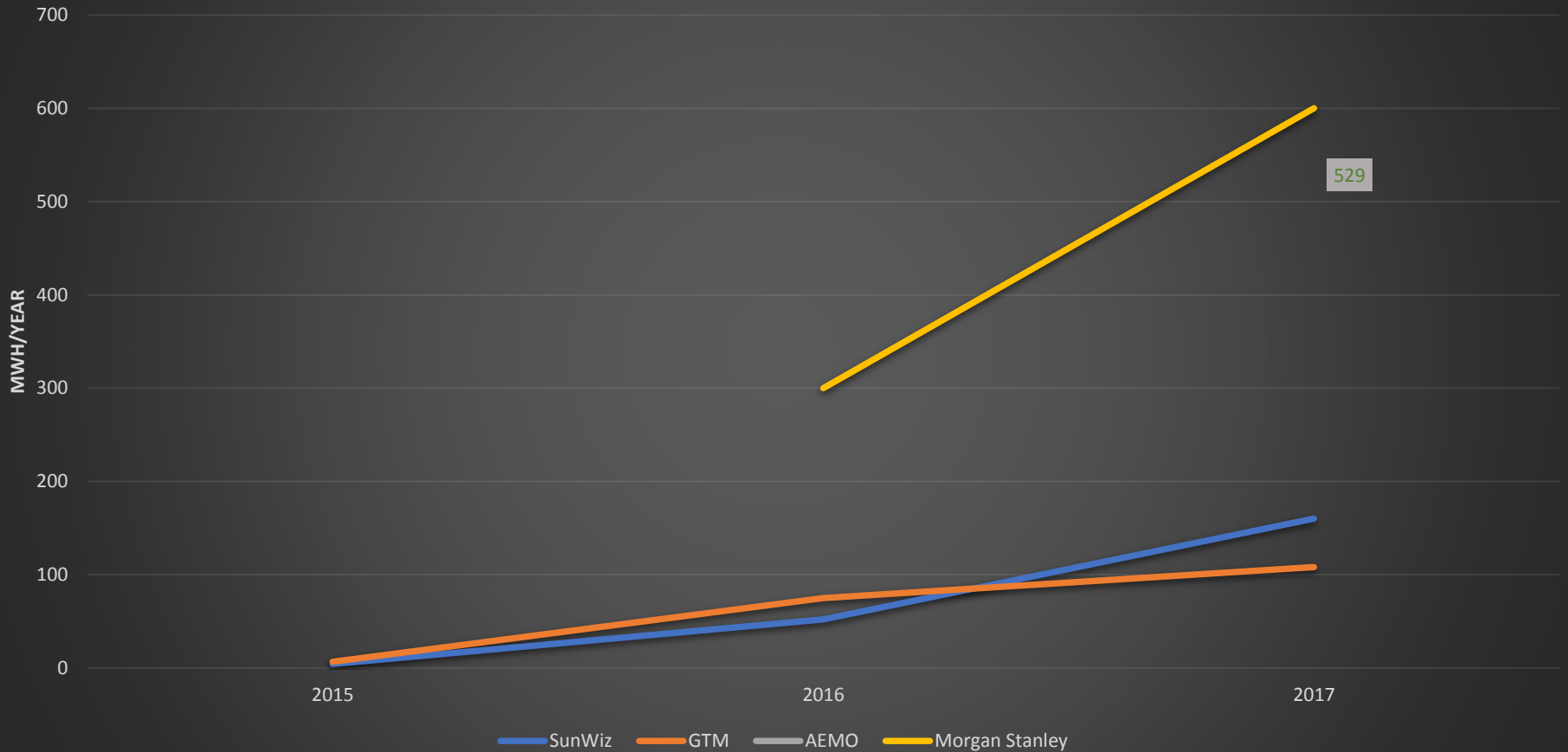
Major Projects

- In 2016 there was 11MWh of installations from 17 major projects and rollout programs totalling 292 installations – a record year.
- In all years, 20MWh across 48 projects and 400 installations.
- The largest is the 2MW installations at Sandfire Degruusa, Nauiyu (Daly River) Remote Community, and Buninyong (Powercor).
- These projects installed a total of 11MWh in 2016 – with strong contributions from the single large batteries at Sandfire, Nauiyu Remote Community, Powercor’s Buninyong, and the UQ Gatton pilot project




Forecast

Comparison of Forecasts



www.sunwiz.com.au/index.php/battery-market-report-2017.html

2017 Battery Market Report
Australia's most comprehensive report on the market for energy storage systems!



The National Trend
Know the market size for batteries in 2016 (and your share of it)

Targeting
Learn how to target the best customers for batteries

Top Ranked Battery Retailers, and more!
All the information you need to understand the battery market for 2017

- **WHO ARE THE TOP RANKED PV RETAILERS, WHOLESALERS, AND MANUFACTURERS**
- SIZE OF THE MARKET IN 2016
- FORECAST MARKET SIZE 2017 AND BEYOND
- TOP RANKS OF MANUFACTURERS, WHOLESALERS, AND RETAILERS
- TOP LOCATIONS FOR BATTERY INSTALLATIONS
- MAJOR ANNOUNCEMENTS IN 2016
- LIST OF KEY MAJOR ENERGY STORAGE PROJECTS, PROGRAMS, AND ROLLOUTS
- SNAPSHOTS AND PROJECTIONS OF BATTERY PRICES IN AUSTRALIA AND GLOBALLY
- LIST OF BATTERY SUBSIDIES AVAILABLE IN AUSTRALIA
- FINANCIALS OF BATTERIES
- WHERE ARE THE BEST LOCATIONS TO INSTALL BATTERIES?
- WHICH CUSTOMERS ARE THE BEST TARGETS FOR BATTERY SALES?
- WHICH TARIFFS ARE MOST FAVOURABLE FOR BATTERIES?
- WHAT ARE CUSTOMERS KEY PURCHASING MOTIVATIONS FOR BATTERIES?
- TRENDS, COMMENTARY, AND INSIGHTS
- CHANNELS: WHICH WHOLESALERS AND WHICH RETAILERS SELL WHICH BRANDS
- INFLUENTIAL BATTERY BRANDS AND OTHER COMPANIES