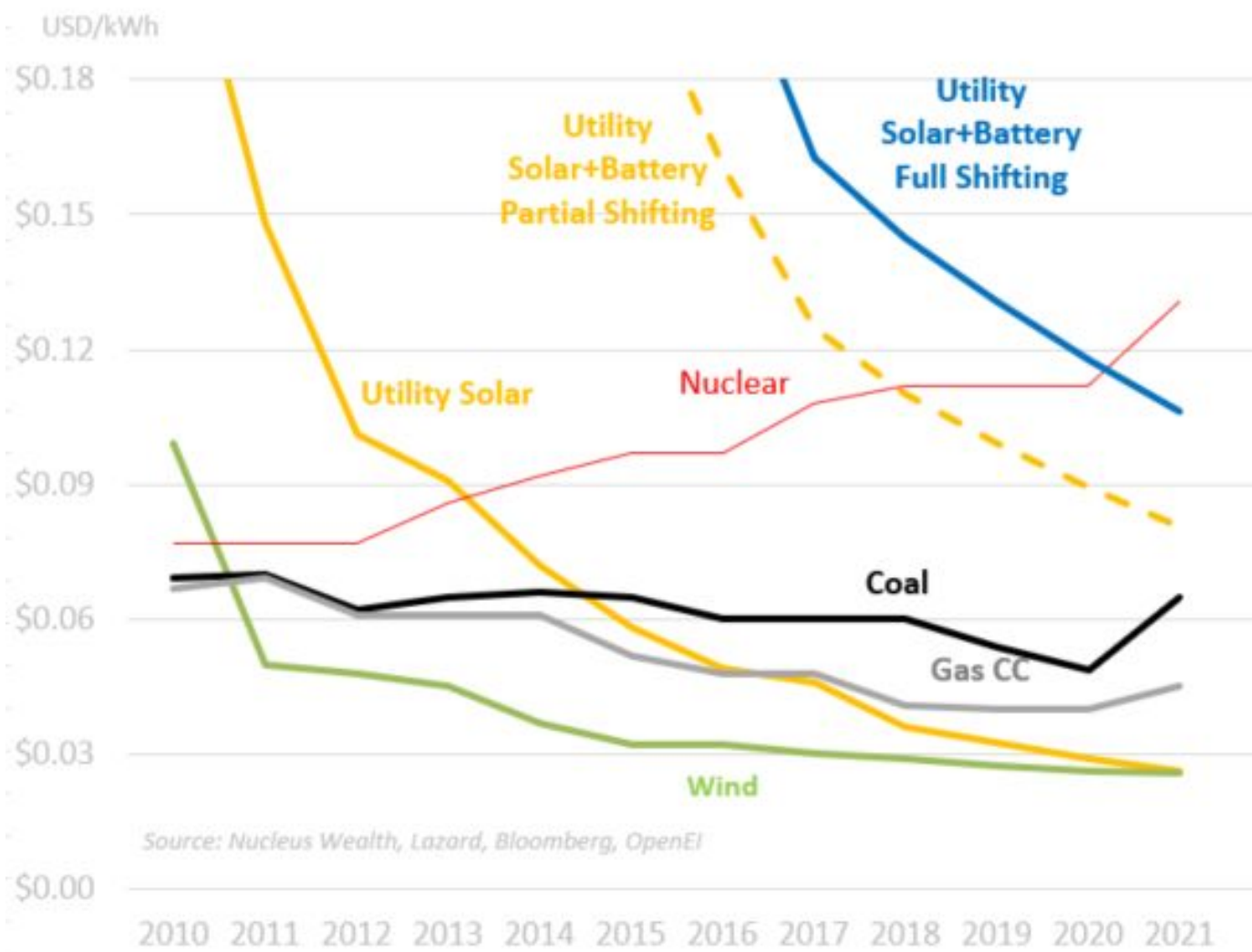




SORTING THE WEIRD RENEWABLE ENERGY TECH FROM THE WONDERFUL



Source: Nucleus Wealth, Lazard, Bloomberg, OpenEI

Levelized Costs (USD/kWh)

Utility Solar

Onshore Wind

Natural Gas @\$3/mmBtu

Natural Gas @\$5/mmBtu

Coal @ \$50/Ton

Utility Solar + partial battery

Coal @ \$100/Ton

Natural Gas @\$10/mmBtu

Utility Solar + full battery

Offshore Wind

Nuclear

Coal @ \$200/Ton

Coal @ \$300/Ton

Natural Gas @\$20/mmBtu

Natural Gas @\$30/mmBtu

Source: Nucleus Wealth, Lazard, Bloomberg, Open EI

Levelised Cost Ex Fuel

\$ 0.03

\$ 0.03

\$ 0.02

\$ 0.02

\$ 0.04

\$ 0.07

\$ 0.04

\$ 0.02

\$ 0.09

\$ 0.10

\$ 0.10

\$ 0.04

\$ 0.04

\$ 0.03

\$ 0.04

Fuel

\$ 0.02

\$ 0.03

\$ 0.02

\$ 0.03

\$ 0.07

\$ 0.01

\$ 0.07

\$ 0.10

\$ 0.13

\$ 0.20

Total

\$ 0.03

\$ 0.03

\$ 0.04

\$ 0.05

\$ 0.06

\$ 0.07

\$ 0.07

\$ 0.08

\$ 0.09

\$ 0.10

\$ 0.10

\$ 0.11

\$ 0.14

\$ 0.16

\$ 0.24

Utility solar and wind
the cheapest option

Adding a partial battery
now cheaper than coal

At 'Russian' prices, the
economic pressure to
switch is immense. The
fuel cost alone is higher
than solar+battery

Retail Electricity Prices (USD/kWh)

China, India

Rooftop Solar (8% discount rate)

US

Japan

Australia

Rooftop Solar + partial battery

European Average

Rooftop Solar + full battery

Germany

Source: Nucleus Wealth, Lazard, Bloomberg, Open EI

Total

\$ 0.08

\$ 0.13

\$ 0.18

\$ 0.28

\$0.20-0.30

\$ 0.34

\$ 0.40

\$ 0.44

\$ 0.55

Rooftop solar the
cheapest option
during the day

And closing fast, if
you add a battery,
on retail prices

Viewer question of the week:

What do you think the most interesting energy technology will be over the next 10 years?

Drop your answers in the comments

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