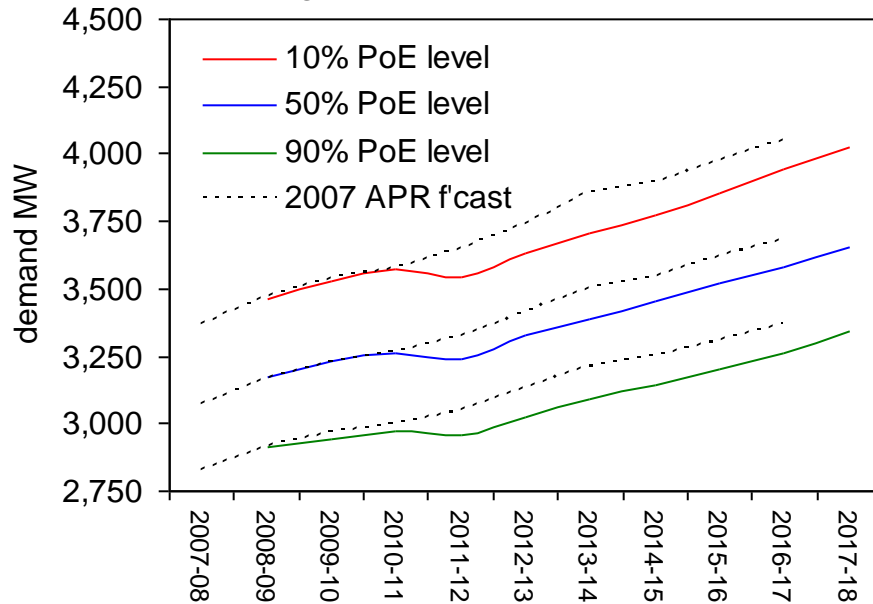




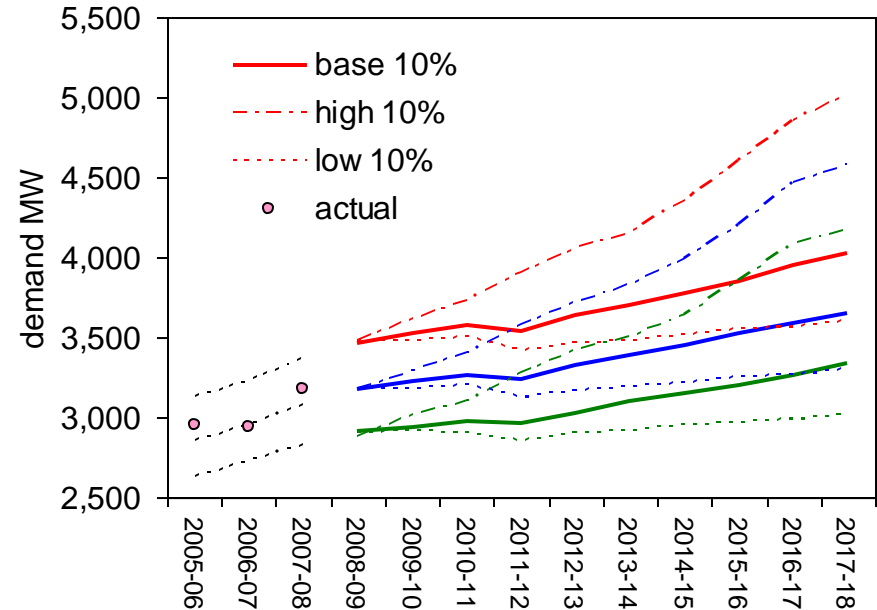
# Demand growth in SA

# Summer Peak Demand Forecasts 2008-09 to 2017-18

Change from 2007 forecasts (base)

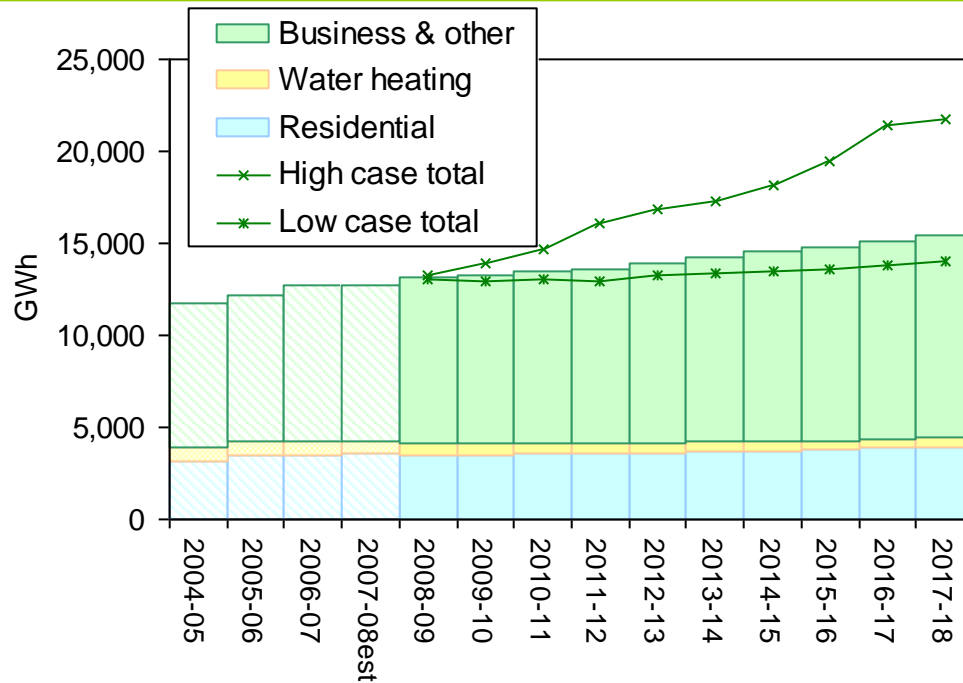


Base High & Low cases



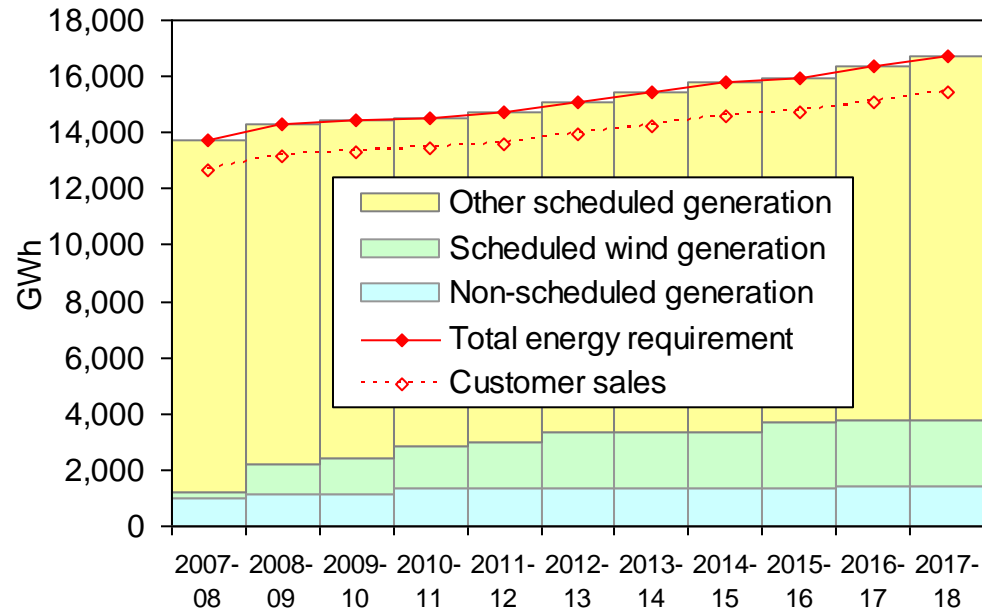
- 2008-09 summer 10% forecast = 3,460 MW (up 97 MW from 2007-08)
- Compared to last year, forecasts are largely unchanged out to 2010-11
- Around 100 MW lower in later years - revised price & GSP assumptions
- Base case growth averages around 1.8% pa over the decade
- High case growth has 10% level around 1,000 MW higher by 2017-18

# Sales Forecasts 2008-09 to 2017-18



- Residential sales expected to fall or remain flat until 2011-12
- Water heating sales fall markedly (pre Budget means testing)
- Business sales include new mining load (08-09) and desal. plant (12-13)
- Base case total sales growth averages 2% pa over the decade
- High case growth of 5.6% pa (Olympic Dam expansion & new pulp mill)

# Energy Forecasts 2008-09 to 2017-18



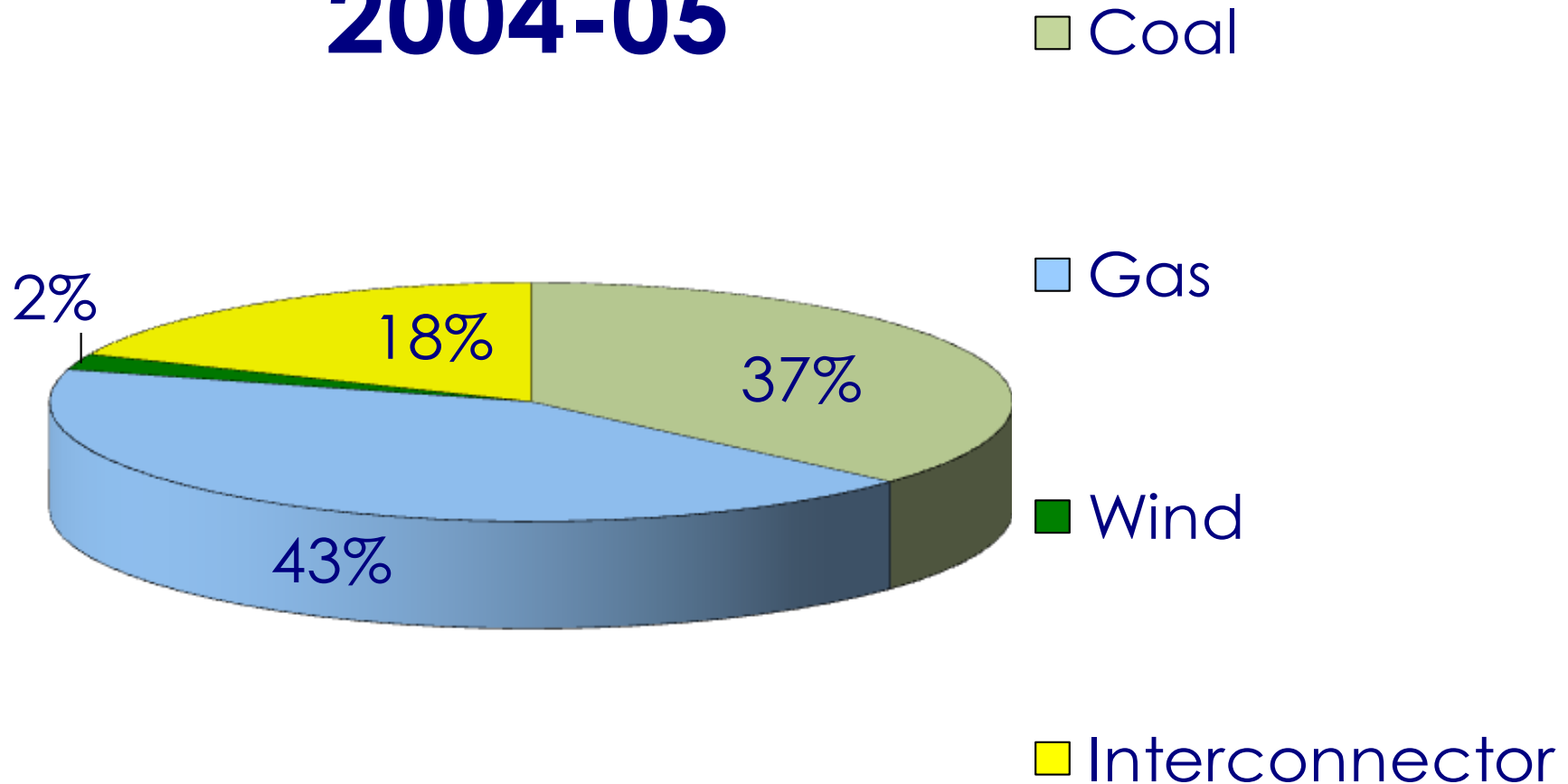
- Total energy requirement projected to grow by 2% pa on average (base)
  - Non-scheduled generation (incl wind) to rise from 7.5% to 8.4% of total
  - Scheduled wind farm generation to rise from 1.3% to 14% of total
  - Conventional scheduled generation to fall from 91.2% to 77.5% of total
- Base case assumptions show overall renewables contribution rising to 21.8% of the total in 2017-18



# Wind growth in SA

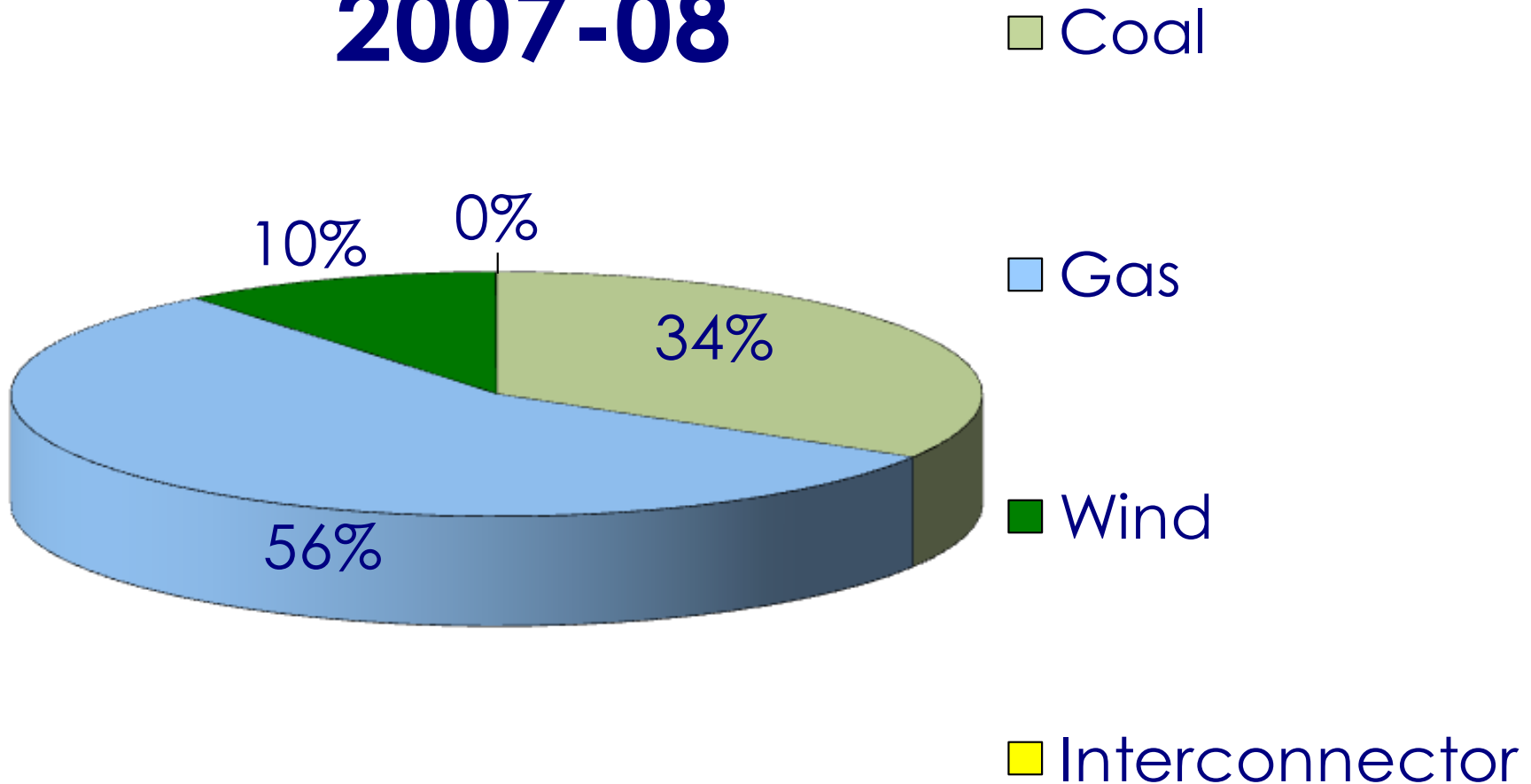
# Energy by Fuel Type

**2004-05**



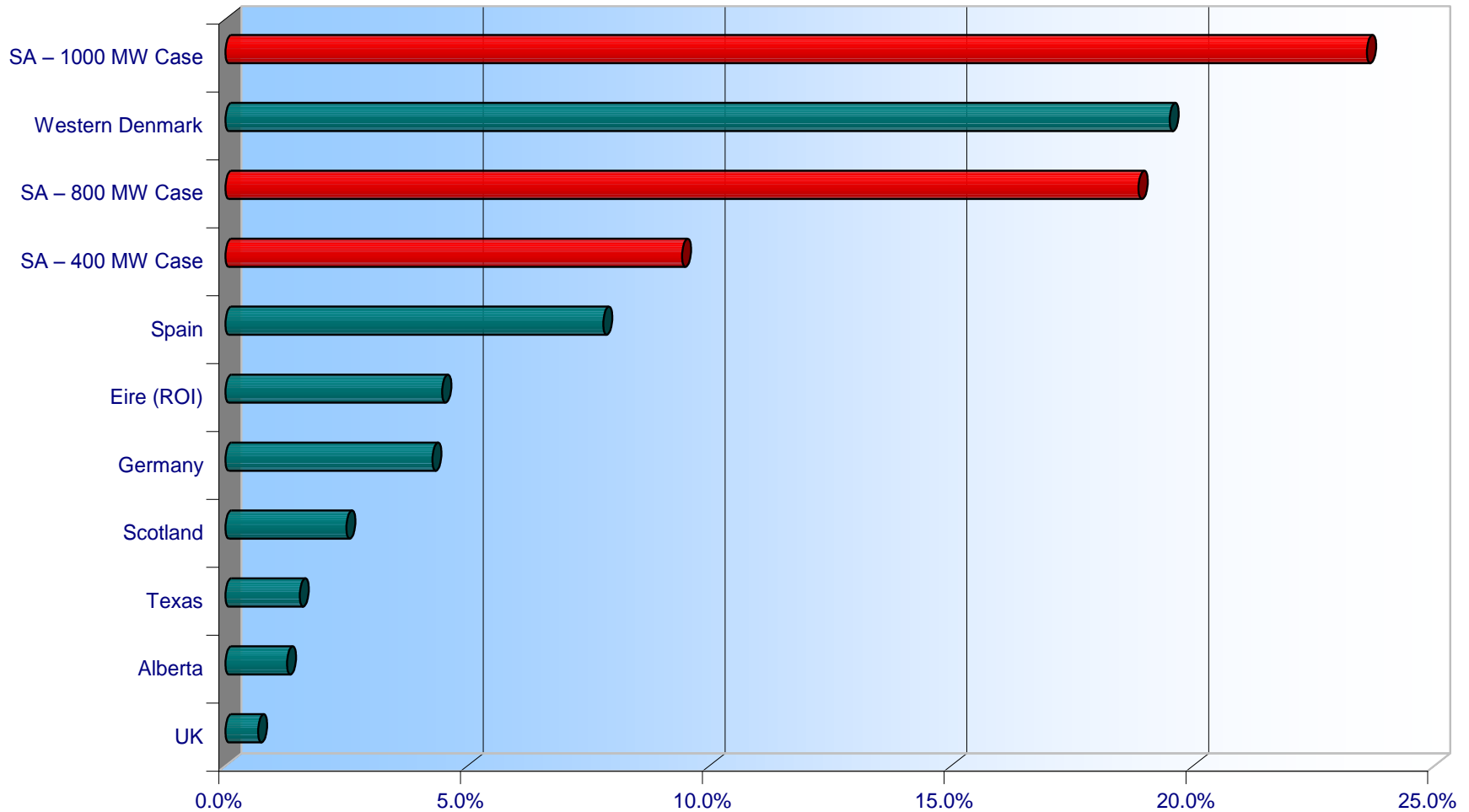
# Energy by Fuel Type

**2007-08**



# International Relativities

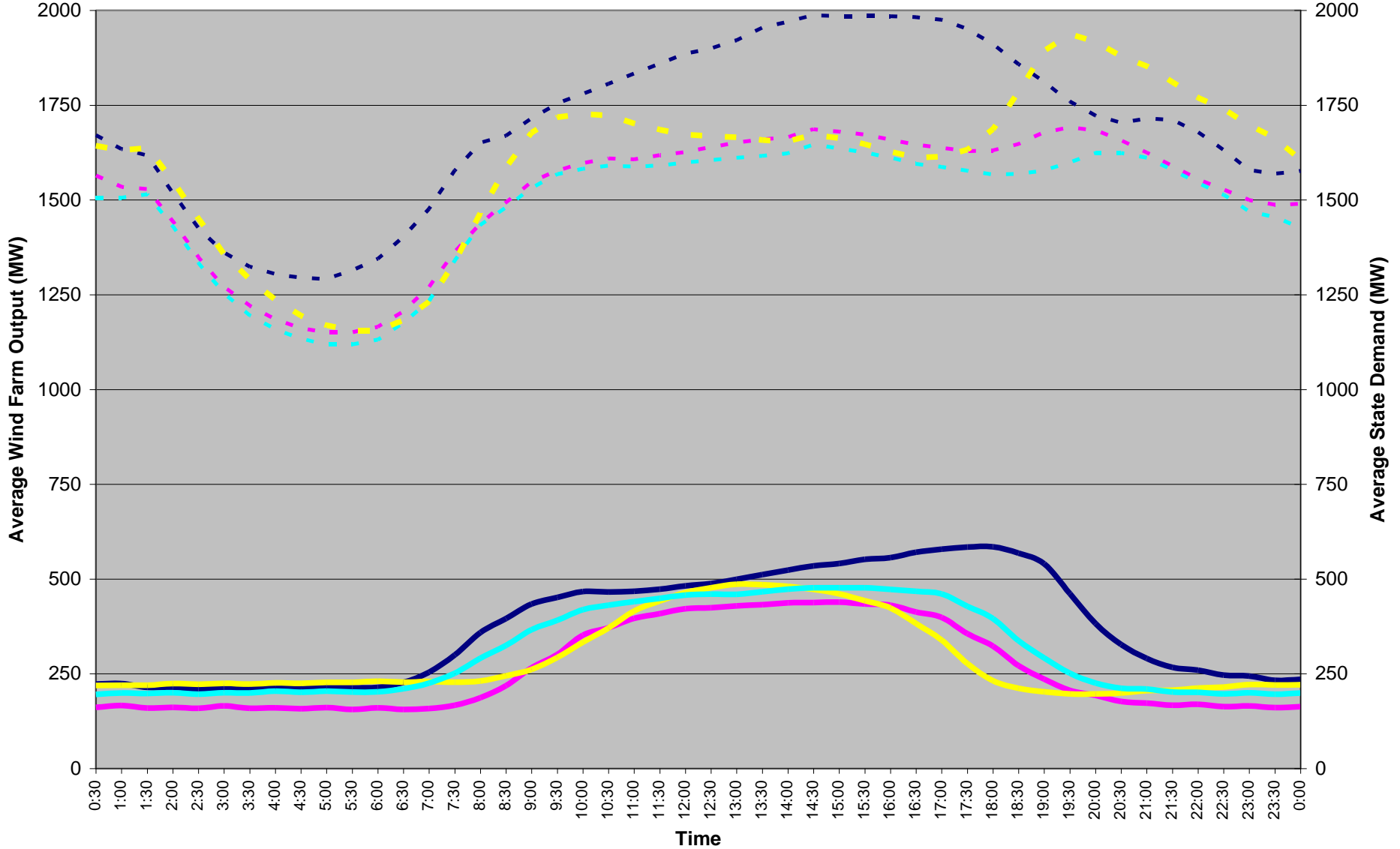
**Wind Penetration by Energy**





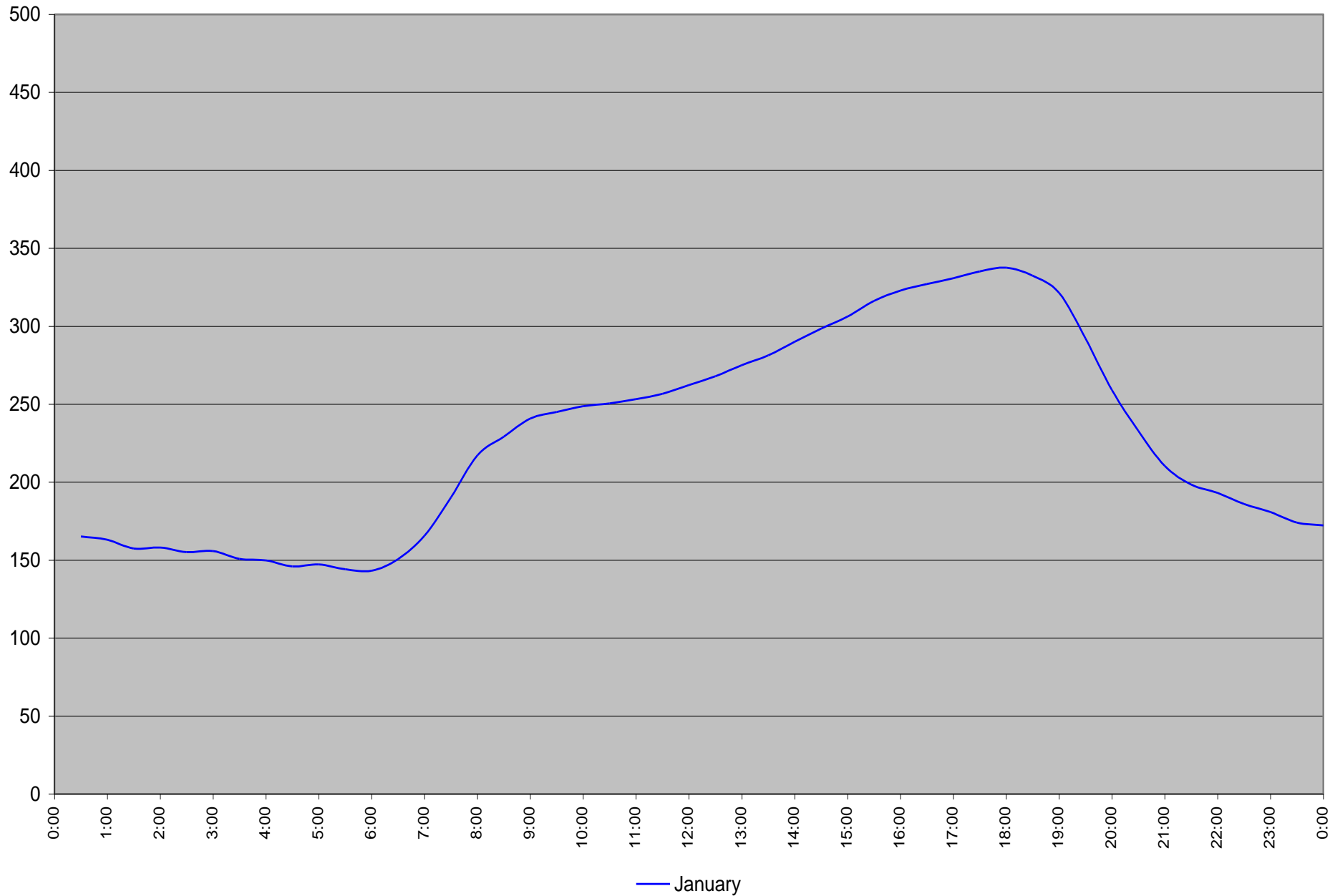
# Relative to Demand

## Seasonal Wind Farm Output Vs State Demand



- Summer WF Output
- Autumn WF output
- Winter WF output
- Spring WF Output
- Typical Autumn Demand
- Typical Spring Demand
- Typical Summer Demand
- Typical Winter Demand

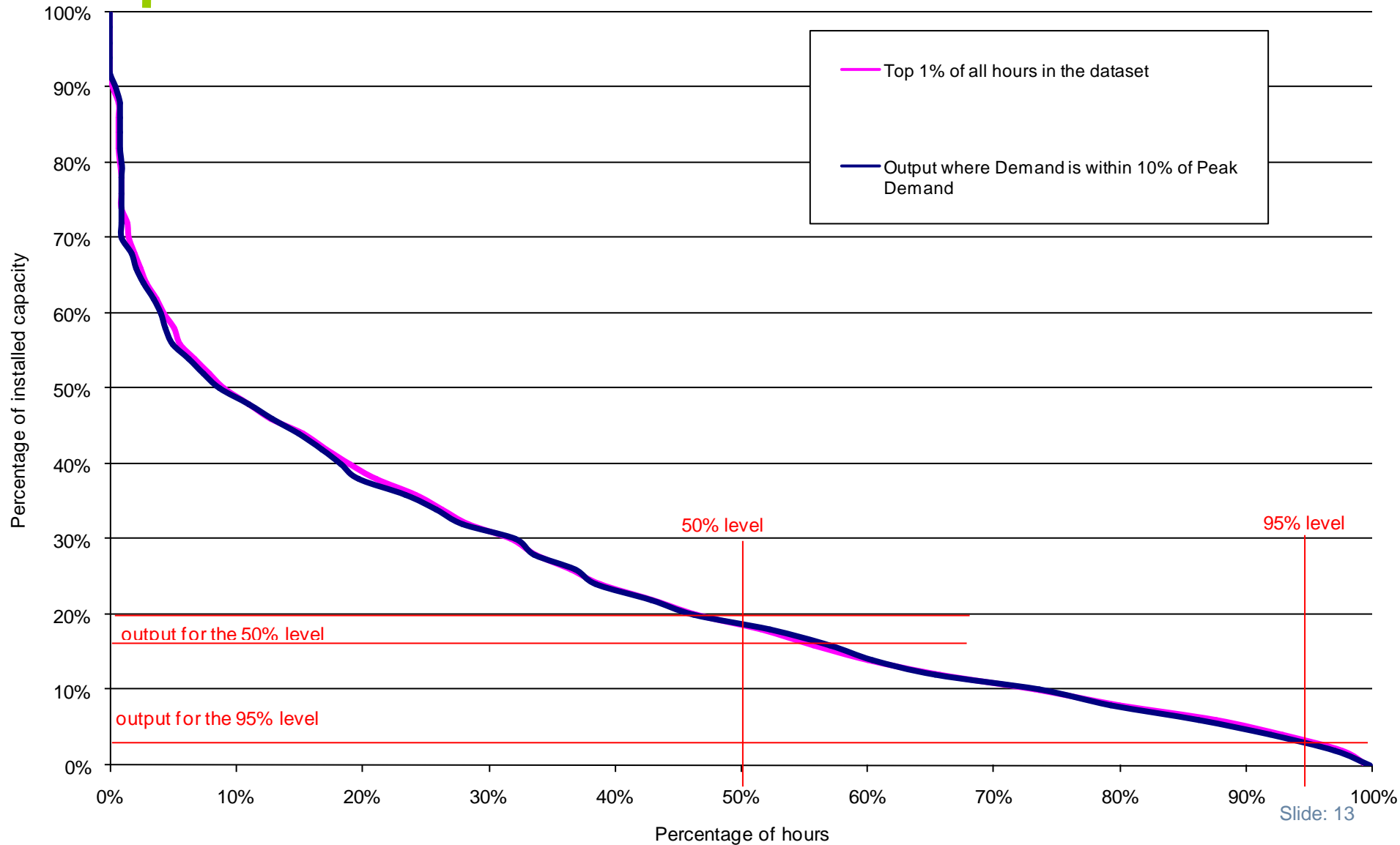
# Average vs Actual





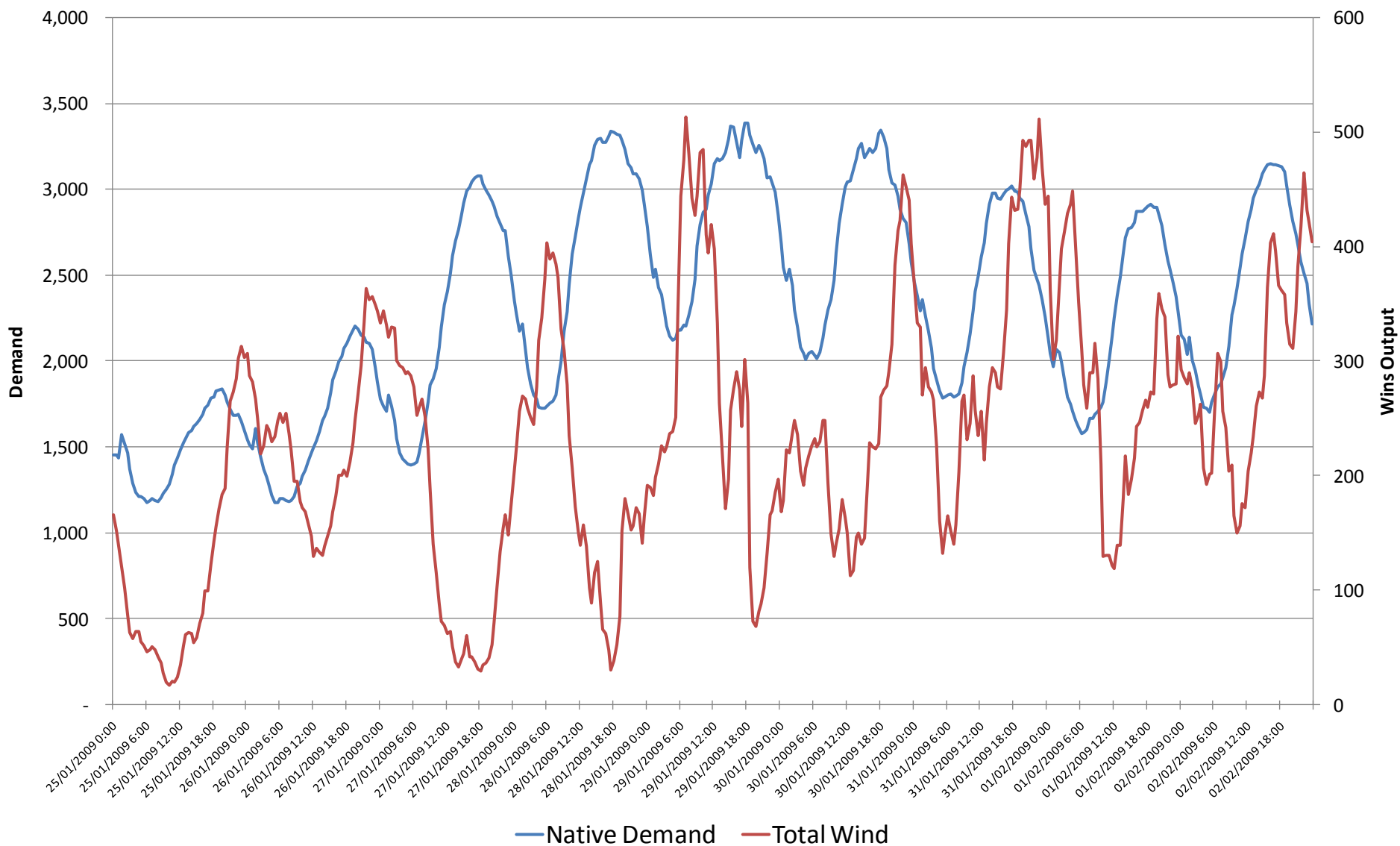


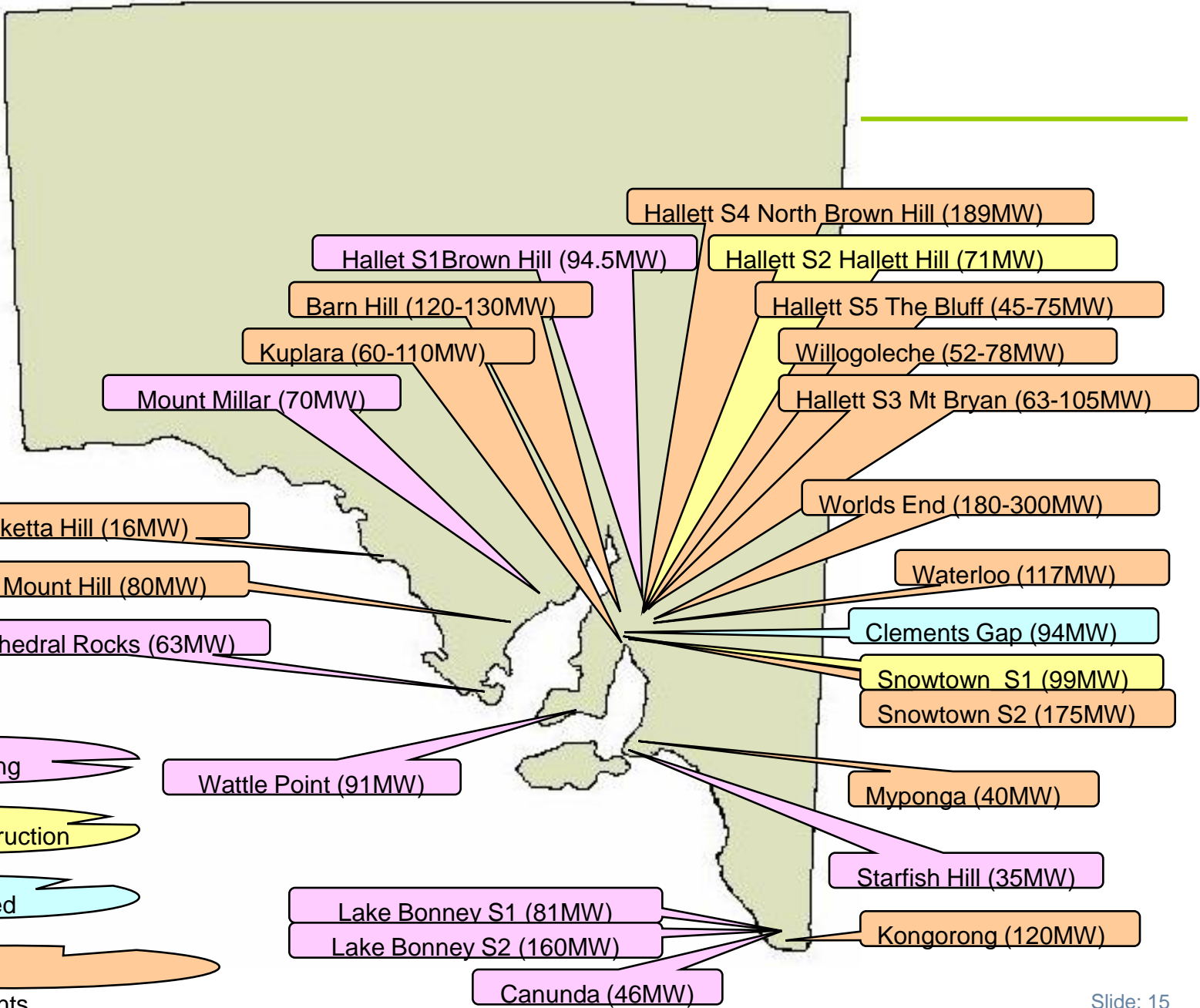
# Wind Contribution @ Peak Demand





# Summer Heat Wave





- Operating
- Under construction
- Licensed
- Advanced Developments



# State by State Wind Farm Summary

| State | Operating | Under Construction | Discussed | Total  |
|-------|-----------|--------------------|-----------|--------|
| SA    | 648       | 265                | 5,200     | 6,130  |
| NSW   | 16        | 132                | 2,100     | 2,248  |
| QLD   | 12        |                    | 840       | 852    |
| VIC   | 152       | 298                | 3,770     | 4,220  |
| TAS   | 140       | 280                | 860       | 1,280  |
| All   | 968       | 975                | 12,770    | 14,730 |