Australia Emergency Lighting - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 120 pages | Mordor Intelligence

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Report description:

The Australia Emergency Lighting Market is expected to register a CAGR of 5% during the forecast period.

Key Highlights
- The increasing demand for energy-efficient lighting systems across the commercial, residential, and industrial sectors is driving the growth of low-power consumption bulbs in the emergency lighting system.
- Technological advancement in the lighting market has led to the development of energy-efficient, self-diagnostic with an extended lifespan, driving the market's growth. Moreover, the government's strict fire and safety regulations are expected to flourish in the Australian emergency lighting market. Further, in September 2022, according to Australasian Fire and Emergency Service Authorities Council (AFAC), a new nationally consistent bushfire danger rating system started across Australia, providing more explicit and accurate information to communities at risk of bushfires.
- The need for more commercial buildings, social spaces, housing, and infrastructure comes with a growing population. Sector-wise, the value of construction work in the private sector was significantly higher than in the public sector. According to the Australian Bureau of Statistics (ABS), in 2022, the total number of dwellings under construction arrived at 241,926 in June, an additional 0.7% increase from the record raised in March of 240,156 homes. This increase was driven by new private sector houses, which have increased to record highs since March 2021, with 102,908 new private dwellings under construction in June 2022.
- Furthermore, the Australian market is also witnessing several strategic collaborations with a global player to gain significant market share in the regional market. For instance, Clevertronics, an Australian evacuation product company, recently partnered with Wirepas, Finland's wireless IoT connectivity provider. The partnership is expected to enable Clevertronics to provide the market with massive-scale, low-cost smart emergency lighting solutions. The easily installable solutions are quickly proving a success, with already 630 sites across Australia, New Zealand, and the United Kingdom deployed in just a few years.

- Moreover, the supporting government regulations (National Construction Code) provide the minimum requirements for the safety and health of workers that are necessary to incorporate in all the on-site construction, such as adequate emergency lighting to guide the constructor to safely exit the place in case of any failure of standard artificial lighting during an emergency. Further, in May 2022, the Australian Building Codes Board released Stage 1 of the NCC 2022 as a general preview in preparation for its execution in September 2022.
- The Internet of Things (IoT) advancement has led to the emergence of networked and communications-enabled emergency lights systems (IoT based). Most key vendors are developing and commercializing IoT-based emergency light systems that can be operated through smartphones. For instance, WBS Technology's EMIoT is an emergency lighting network and testing system that leverages IoT technology to create a cost-effective, wireless cloud solution that allows live remote monitoring of 99% of the building with no cabling or additional hardware. Its implementation in smart buildings is expected to drive the market in the future.
- According to global Australia, the Internet of Things, smart devices connected to the internet that collect and share data, can boost Australia's GDP by USD 230 billion over the next decade. Further, the number of companies operating in blockchain and cryptocurrency exploded by 153%. Australian industry players are expected to contribute an estimated global annual business value of more than USD 175 billion by 2025.
- However, significant barriers to market revenue growth include high initial investments, an extensive cabling system requirement, and a need for appropriate system integrity. The high cost of emergency power and lighting systems, equipment, installation, and wiring will significantly reduce customer desire.
- Amid the outbreak of COVID-19, the market witnessed a production shutdown and disruption in the supply chain, leading to weakened industrial output growth and a decline in light-manufacturing production across significant manufacturing hubs. Major halts in construction activities during the initial phase of the pandemic have resulted in a slump in demand for lighting products, as the construction industry used to be a significant adopter of emergency lighting systems. Furthermore, the construction industry is anticipated to register substantial growth in the forecast period.

Australia Emergency Lighting Market Trends

Commercial Segment in Australia is Expected to Drive the Market

- Rapid urbanization has fueled the demand for residential and commercial buildings, leading to increased construction projects across the country. According to the Australian industry and Skill committee, the Construction industry generates USD 367.2 billion in revenue, producing around 9% of Australia's Gross Domestic Product. It is projected to grow at an annual rate of 2.4% over the five years from 2019 to 2024.
- Commercial construction activity is increasing in the country. According to Master Builders Australia, an association of 32,000 building and construction companies in Australia, the value of commercial building activity in Australia accounted for USD 29.6 billion in 2022. and it is forecasted to increase by USD 29.8 billion in 2025. The increase in commercial building activity presents new opportunities for the market.
- The stringent guidelines of the governmental authorities in the country push the adoption of emergency lighting in commercial buildings. According to the National Construction Code and Victorian Building Authority, Emergency Lighting is required to be installed in all Class 1b, 2, 3, 4, 5, 6, 7, 8, and 9 Buildings. Also, all emergency lighting is required to meet the Australian standards in AS/NZS 2293 parts 1, 2, and 3. These standards outline the design, installation, maintenance, and product requirements of emergency lighting systems required in all commercial premises. Government initiatives may further drive the demand for the studied market.
- The power outages in the country also develop a need for emergency lighting. Recently, various parts of central and southern Victoria were affected by a power outage caused due to damaging winds. According to CitiPower and PowercorAusNet, the power outage led to commercial and transport disruptions as businesses without backup generators had to suspend operations.

- Emergency lighting is necessary in such cases of power outages in the commercial vertical. Furthermore, in November 2022, gusty winds, heavy rain, and 423,000 lightning strikes caused widespread damage to power lines across Australia, leaving more than 34,000 people still waiting for electricity reconnections.

LEDs are Expected to Witness Significant Growth

- The increasing government policies in the country, such as a ban on the usage of incandescent light and the energy-efficient and cost-saving nature of LEDs, are increasing the penetration of LEDs. Moreover, LEDs are highly controllable, as the integrity of LEDs can vary based on the requirements when integrated with a driver.
- For instance, according to Australian Energy Market Operator (AEMO), as of February 2022, electricity usage across Australia is estimated to be 93.5 terawatt hours. This was a decline in electricity use across the country compared to previous years. Adopting low-power consumption lighting systems in emergency lighting will drive growth.
- LEDs reduce power consumption and light pollution and have higher self-life than halogen bulbs. The increasing penetration of LEDs, due to their energy-efficient and cost-saving nature, is impacting the market's growth. As they are highly controllable, when integrated with a driver, the intensity can vary based on the requirements.
- According to Energy Rating Australian Government report, on average, there are 37 light bulbs which account for 10% of the average Australian household electricity budget. By replacing 18 halogen lamps with LEDs, customers can save AUD 102 per year.
- Moreover, in October 2022, Ledtec, a significant player in the LED lighting revolution across industries in Australia with its innovative, heavy-duty, durable, and energy-efficient, introduced the KUE industrial LED light series to mine sites in Australia, ascertaining the need for a more competitive, robust LED light that is environmentally friendly and cost-effective. Such investments in LED lights by different players in the country may further drive the studied market growth.

Australia Emergency Lighting Industry Overview

The Australian emergency lighting market is favorably concentrated and is dominated by a few significant players, like WBS Technology ABN, ABB Australia (ABB Ltd), Clevertronics Pty Ltd, Haneco Lighting Australia Pty Ltd, and E&E Lighting Australia. These market players are concentrating on expanding their customer base in foreign countries. These companies utilize strategic collaboration initiatives to boost their market share and profitability. However, due to technological advancements and product breakthroughs, mid-size to smaller companies are extending their market presence by securing new contracts and entering new markets.

In January 2021, Zencontrol acquired a significant shareholding in Evolt, an Australian distributor of lighting and emergency products. It distributes several brands across Australia, including Atom, Lutec, Wiz, and the emergency range Ektor. The acquisition opens up new opportunities for Zencontrol's 4th generation-monitored emergency lighting systems. The offer is further expected to strengthen the synergies with monitored emergency lighting and smart buildings together under one Zencontrol cloud solution.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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