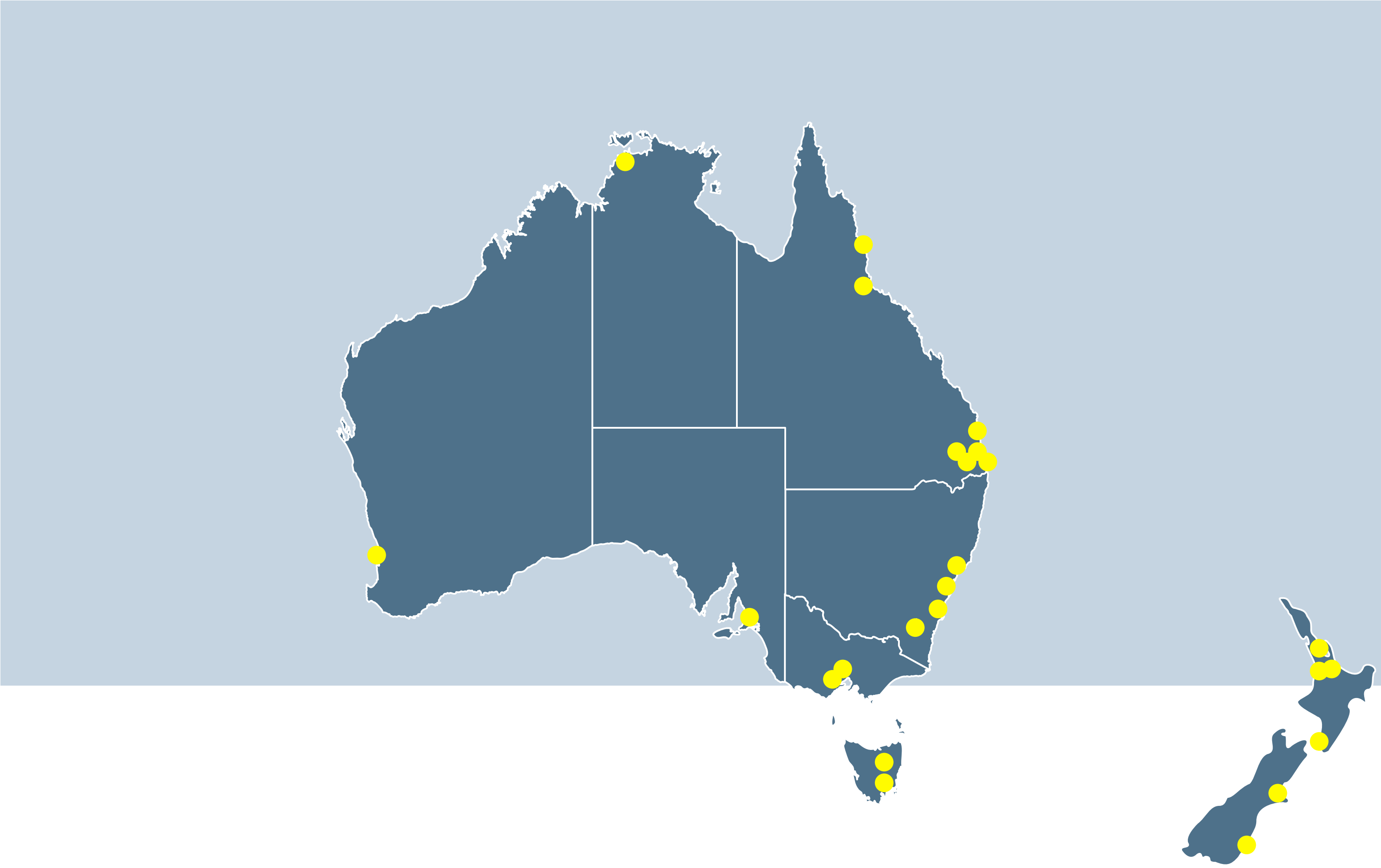

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Oceania LED and Smart Street Lighting: Market Forecast (2018 – 2027)

Public Outdoor Lighting Market

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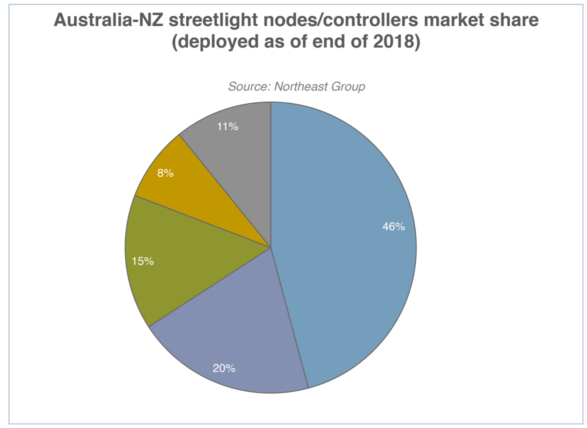
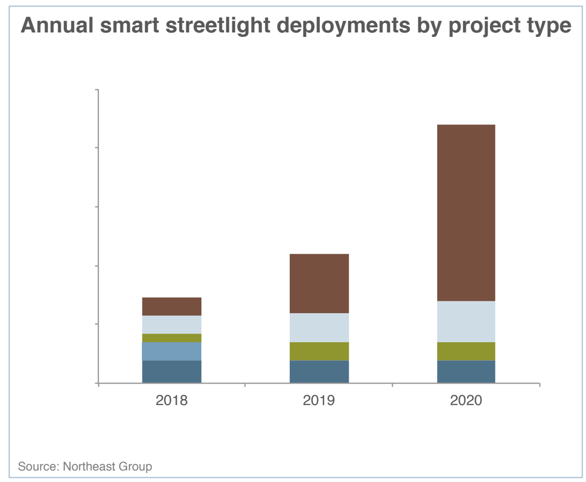
Oceania LED and Smart Street Lighting: Market Forecast (2018 – 2027)

Australia and New Zealand will see significant investments in smart street lighting deployments and could become the most developed markets in the world by the end of the forecast period. Until recently, these two countries lagged behind the global leaders such as the UK and US and even today there are comparatively few LED and smart street lighting deployments, particularly in Australia. But the market has changed significantly in the past three years since the region's smart streetlight roadmap was first developed. Australia and New Zealand are now on pace to reach nearly full LED penetration and over 70% smart penetration by the end of the forecast period.





Most notably, both Australia and New Zealand have significant regulatory drivers. In New Zealand, the government is funding 85% of smart and LED streetlight conversions through 2021, while Australia has set a nominal goal of achieving full smart streetlight penetration by 2027. To achieve this target, Australian states have been funding conversions and altering lighting codes to incentivize utilities (which own almost all the streetlights in Australia) to convert to smart streetlights.

Meanwhile, many of the barriers that had previously held up the market are now being addressed. Prices for both LED luminaires and controls are declining (both on the global level and in Oceania, where previously small volumes had driven up per-endpoint costs). Australia and New Zealand are also now adopting international standards, which will facilitate a competitive vendor landscape and smoother conversions. Finally, as deployments have increased, so has local knowhow, and models are now in place for large-scale conversions. There are still important obstacles to overcome – most notably, there are conflicts of interest for utilities that own the streetlights but also generate revenue from energy sales and streetlight maintenance contracts. As much as there is clear momentum, most projects are still at the pilot level in Australia and regulations are still being adjusted. But with an improving framework in place, a rapidly developing market in New Zealand, and declining prices for luminaires and controls, the region as a whole looks poised to develop one of the most complete smart streetlight markets in the world by 2027.

Key questions answered in this study:

- How are LED and smart streetlight deployments advancing at the largest cities and utilities in both Australia and New Zealand?
- What are the market shares of both the leading streetlight communications and controls vendors?
- What cities have upcoming RFPs or have just begun streetlight and smart city projects?
- What new regulations are driving the markets in Australia and New Zealand?
- What is the ten-year forecast for LED and smart street lighting across all segments?

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