

Poles for Street Lights & Parking Ed 2 2019

Chapter Summaries

EXECUTIVE SUMMARY

Chapter 1 - STREET AND PARKING LIGHT POPULATION

Summary of the world's roads, stock of street lights by major countries.

Chapter 2 – STREET AND PARKING LIGHT SALES

Annual installations of street light poles in units and sales in value.

Chapter 3 - THE SMART CITY AND SMART STREET LIGHTING

Outline and discussion of the smart city concept and its implications for smart street lighting. Regional developments are discussed and the major smart lighting manufacturers outlined.

Chapter 4 - PASSIVE SAFETY

Passive Safety is a fundamental driver of the market for street lighting poles in the advanced countries and is reaching out into other markets. The norms define different speed classes for different levels of safety for passengers, and categorise columns as high energy absorbing, low energy absorbing and non-energy absorbing elements. In addition to composite and aluminium poles, there are two types of frangible steel pole; the breakaway or slip-base pole, and the impact absorbing pole. Outlines of Passive Safety in the EU and the main using countries, the United States and others.

Chapter 5 – PARKING

Parking is a smaller segment of the market for lighting poles than street lights, amounting to 9% of it. Both on-street and off-street parking can be divided into two categories, regulated and/or paid-for parking and unregulated, free parking. The global markets are outlined and installed bases tabled with annual demand.

Chapter 6 - POLE MATERIALS

Aluminium/steel, concrete, wood and composite poles, applications with their advantages and disadvantages.

Chapter 7 - ANNUAL INSTALLATIONS OF LIGHT POLES

139 tables with analysis of new installations and replacements of street light poles by material (steel/aluminium, concrete, wood and composite) from 2017 to 2025, in units and value.

Chapter 8 - MANUFACTURERS OF LIGHTING, PARKING AND DISTRIBUTION POLES

Profiles of 56 companies manufacturing poles of all materials; steel/aluminium, concrete, wood and composite, in all major markets.

GLOSSARY

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Table 1: Road length and street lights

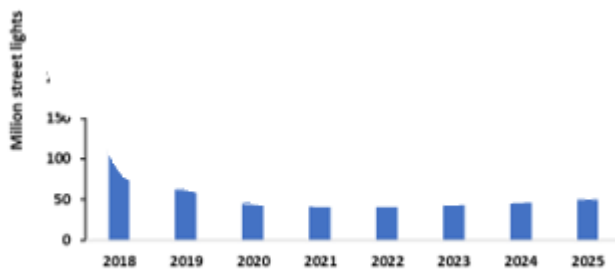
	Km of roads	Share	Street lights
United States			
China			
India			
Brazil			
Russia			
Japan			
Canada			
France			
Thailand			
South Africa			
Australia			
Spain			
Germany			
Sweden			
Indonesia			
Italy			
Finland			
Turkey			
Poland			
United Kingdom			
202 other countries			
World			

Source: CIA, StatPlan

The world population of street lights

In 2018 there are XX million street lights in the world, rising at a cagr of XX% to XXX million in 2025.

Figure 1: Population of street lights in the world 2018 to 2025



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Table 2: Installed population of street lights in the world 2018 to 2025

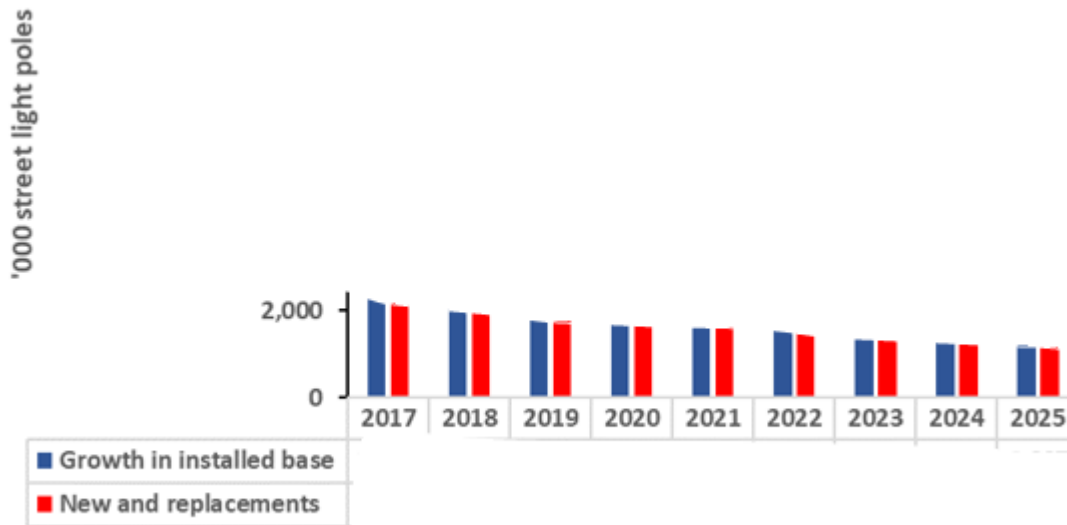
Million street lights	2018	2019	2020	2021	2022	2023	2024	2025
Europe								
CIS								
Middle East								
North Africa								
Sub-Saharan Africa								
Asia Pacific								
Latin America								
North America								
World								

Source: StatPlan

Annual installations of street light poles

The number of annual installations of street light poles is substantially higher than the growth in the stock of street lights, because it includes replacements of old stock and replacements due to passive safety regulations. In 2018, XX million street light poles were added to the existing stock or replaced and this will increase to XX million in 2025. This compares with growth in the installed base of XX million in 2018 rising to XX million in 2025.

Figure 2: Growth in street light stock and annual new and replacement units



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The number of poles used in parking lots amounts to around XX% of the installed base of street poles.
The annual sales are estimated at

Table 3: Annual new and replacement sales of poles for parking lots

'000 poles	2018	2019	2020	2021	2022	2023	2024	2025
USA								
Canada								
Europe								
China								
Japan								
RoW								
World								

Passive safety pole types

Safe materials

Steel and aluminium poles are increasingly popular because of their stress and impact characteristics and the growing emphasis on passive safety. Manufacturers argue a number of cases for steel, steel poles will not break like wood poles, they merely bend.

Frangible pole types

There are two types of frangible pole; the breakaway or slip-base pole, and the impact absorbing pole.

Breakaway and slip-base poles

Breakaway devices have the advantage of a reduced likelihood of impact damage and injury, but the disadvantage that a falling pole can be a hazard to surrounding traffic, pedestrians and property. Non-breakaway poles may be appropriate if pedestrian traffic is high, or overhead electric lines are nearby. However, breakaway poles are preferred in most roadside areas.

High energy absorbing (HE):

HE columns decelerate a vehicle the most but generally also cause the most damage to the vehicle which can result in secondary danger for the occupants. The occupant(s) will have to cope with a greater impact

Low Energy absorbing (LE)

LE columns

Non Energy absorbing (NE)

NE columns enable the vehicle to continue driving.....

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2. ANNUAL INSTALLATIONS OF LIGHT POLES

Regional installations of street light poles in units

Table 4: Total annual installations of all street light poles in '000 units

000 units	2017	2018	2019	2020	2021	2022	2023	2024	2025
Europe									
CIS									
Middle East									
North Africa									
Sub-Saharan Africa									
Asia Pacific									
Latin America									
North America									
World									

Table 5: Annual installations of new street light poles in '000 units

000 units	2017	2018	2019	2020	2021	2022	2023	2024	2025
Europe									
CIS									
Middle East									
North Africa									
Sub-Saharan Africa									
Asia Pacific									
Latin America									
North America									
World									

Table 6: Annual replacements like with like including passive safety poles for steel/aluminium poles in '000 units

000 units	2017	2018	2019	2020	2021	2022	2023	2024	2025
Europe									
CIS									
Middle East									
North Africa									
Sub-Saharan Africa									
Asia Pacific									
Latin America									
North America									
World									

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Table 7: Annual replacements of wood & concrete with passive safety steel/aluminium poles ‘000 units

000 units	2017	2018	2019	2020	2021	2022	2023	2024	2025
Europe									
CIS									
Middle East									
North Africa									
Sub-Saharan Africa									
Asia Pacific									
Latin America									
North America									
World									

Table 8: Total annual installations of steel light poles in units by material

000 units	2017	2018	2019	2020	2021	2022	2023	2024	2025
Steel/aluminium									
Wood									
Concrete									
Composite									
All poles									

Table 9: Total annual sales of all steel light poles in \$ million

\$ million	2018	2019	2020	2021	2022	2023	2024	2025
Europe								
CIS								
Middle East								
North Africa								
Sub-Saharan Africa								
Asia Pacific								
Latin America								
North America								
World								

Table 10: Annual sales of wood steel light poles in \$million

\$ million	2018	2019	2020	2021	2022	2023	2024	2025
Europe								
CIS								
Middle East								
North Africa								
Sub-Saharan Africa								
Asia Pacific								
Latin America								
North America								
World								

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Table 11: Annual sales of concrete poles in \$million

\$ million	2018	2019	2020	2021	2022	2023	2024	2025
Europe								
CIS								
Middle East								
North Africa								
Sub-Saharan Africa								
Asia Pacific								
Latin America								
North America								
World								

Table 12Table 13: Annual steel/aluminium poles in \$million (including passive safety poles)

\$ million	2018	2019	2020	2021	2022	2023	2024	2025
Europe								
CIS								
Middle East								
North Africa								
Sub-Saharan Africa								
Asia Pacific								
Latin America								
North America								
World								

Table 14: Annual composite poles in \$ (including passive safety poles) in \$million

\$ million	2018	2019	2020	2021	2022	2023	2024	2025
Europe								
CIS								
Middle East								
North Africa								
Sub-Saharan Africa								
Asia Pacific								
Latin America								
North America								
World								

For ease of reference, the tables in this chapter are colour-coded for material.

- Blue all poles
- Black steel/aluminium
- Green wood
- Grey concrete
- Brown composite

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- [Steel/aluminium street light poles in units in Europe](#)
- [Table 15: Total annual installations of steel/aluminium street light poles in Europe in units](#)

Units	2017	2018	2019	2020	2021	2022	2023	2024	2025
Albania									
Austria									
Belgium									
Bosnia & Herzegovina									
Bulgaria									
Croatia									
Cyprus									
Czech Republic									
Denmark									
Estonia									
Finland									
France									
Germany									
Greece									
Hungary									
Iceland									
Ireland									
Italy									
Latvia									
Lithuania									
Luxembourg									
Macedonia									
Malta									
Netherlands									
Norway									
Poland									
Portugal									
Romania									
Serbia Montenegro									
Slovakia									
Slovenia									
Spain									
Sweden									
Switzerland									
Turkey									
United Kingdom									
Europe									

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Wood street light poles in units in North America

Table 16: Total annual installations of wood street light poles in North America in units

Units	2017	2018	2019	2020	2021	2022	2023	2024	2025
USA									
Canada									
Bermuda									
Greenland									
North America									

Table 17: Total annual new installations of wood street light poles in North America in units

Units	2017	2018	2019	2020	2021	2022	2023	2024	2025
USA									
Canada									
Bermuda									
Greenland									
North America									

Table 18: Total annual renewals of wood street light poles in North America in units

Units	2017	2018	2019	2020	2021	2022	2023	2024	2025
USA									
Canada									
Bermuda									
Greenland									
North America									

Table 19: Total annual installations of wood street light poles in North America in \$000

\$ 000	2018	2019	2020	2021	2022	2023	2024	2025
USA								
Canada								
Bermuda								
Greenland								
North America								