

Towers and Poles Report Ed 9 2021

Chapter Summaries

EXECUTIVE SUMMARY

Chapter 1 - OVERVIEW OF SUPORTERS – TOWERS AND POLES

Overview of the market and infrastructure, with installed population and demand of towers and poles by segment.

Chapter 2 - ELECTRICITY AND TELECOM LATTICE TOWERS - INSTALLED POPULATION

Installed population of lattice towers by segment, electricity transmission/telecoms, by country.

Chapter 3 - SALES OF TRANSMISSION AND TELECOM LATTICE TOWERS IN UNITS

Sales of lattice towers in units by segment, electricity transmission/telecoms, by country, 2019 to 2026.

Chapter 4 - SALES OF TRANSMISSION AND TELECOM LATTICE TOWERS IN NOMINAL \$ VALUE

Sales of lattice towers in nominal \$ value by segment, electricity transmission/telecoms, by country, 2019 to 2026.

Chapter 5 - ELECTRICITY, TELEPHONE, STREETLIGHT & CAR PARK POLES - INSTALLED POPULATION

The installed base of poles in units by segment, by material – wood/steel/concrete/composite.

Chapter 6 - ELECTRICITY, TELEPHONE, STREETLIGHT & CAR PARK POLES – SALES IN UNITS & \$ VALUE

Summary charts of sales of poles in units & nominal \$ value by segment, by material – wood/steel/concrete/composite, by pole length.

Chapter 7 - SALES OF POLES IN UNITS

Sales of poles in units by segment, by material – wood/steel/concrete/composite, by pole length.

Chapter 8 - SALES OF POLES IN NOMINAL \$ VALUE

Sales of poles in nominal \$ value by segment, by material - wood, steel, concrete, composite, by pole length.

Chapter 9 - THE IMPACT OF COVID-19 ON THE MARKET AND INDUSTRY FOR TOWERS AND POLES

The impact of the pandemic on the market in terms of supply and demand.

Chapter 10 - LONG TERM DEMAND CYCLES FOR TOWERS AND POLES

The growth of transmission line networks is a fundamental driver of the markets for towers and poles, both in line length and voltage. Long term demand is a function of the age and the expansion of the networks.

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Chapter Summaries

Chapter 11 - THE VALUE CHAIN – THE MARGIN STACK

The value chain is a continuous process of adding cost to a product. Depending where you position it, the value changes, the end user's capex being some five times the cost of original materials. The value chain is analysed with different mark-ups for each of six stages.

Chapter 12 - TRANSMISSION MONOPOLES vs. LATTICE TOWERS

The March of the Monopoles - long established in the US, EHV monopoles are breaking into new markets with innovative new designs, replacing lattice towers, especially in Europe. This trend is driven by pressure on rights-of-way, visual criticism of lattice towers and public fears of EMF dangers to children.

Chapter 13 - TYPES OF TOWERS OR PYLONS

Lattice towers are designed for different functions and stresses and there is wide variation in cost; suspension towers, tension towers, angle suspension towers, dead-end towers, transposition towers. Tower installation is a dangerous and complex procedure and has an impact on costs.

Chapter 14 - SERVICE LIFE AND MAINTENANCE OF STEEL LATTICE TOWERS AND MONOPOLES

The service life of steel monopoles and lattice towers can be severely curtailed after a period of time without preventive treatment. Deterioration goes through three identifiable stages before the structure collapses, each with cost implications.

Chapter 15 - COMPETITIONS FOR TRANSMISSION POLE DESIGN

Chapter 16 - NATIONAL MARKETS FOR ELECTRICITY AND TELEPHONE DISTRIBUTION POLES

The statistics for utility poles are not very systematic and are variable in extent from country to country. With wide searching a large amount of data has been accumulated and StatPlan has assembled and maintains an ever-increasing databank for this topic.

Chapter 17 - STREET LIGHTING

Street lighting is a hot topic, because of the developments of IoT, of the smart city and the advent of energy saving LEDs. With urban and transport development, street lighting is a growth sector. This has implications for the pole markets in renewal of old poles and substitution with new materials such as composites.

Chapter 18 - PARKING

Parking light poles are a small segment of the street lighting stock. Parking is receiving attention from planners as cities expand and urban space becomes more crowded.

Chapter 19 - THE SMART CITY AND SMART UTILITY & STREET LIGHTING

A fast growing expansion driven by efficiency and the Internet of Things.

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Chapter Summaries

Chapter 20 - PASSIVE SAFETY

Passive safety has made strides in the last ten years and is now the subject of regulation in many advanced countries and attracting attention in some developing countries. It is an important driver for street lighting and for electricity and telephone poles built along roads.

Chapter 21 - UTILITY POLE MATERIALS AND SERVICE LIFE - TRADITIONAL MATERIALS/WOOD/STEEL/ CONCRETE

The various materials used for poles – wood/steel/concrete/composite are discussed.

Chapter 22 - COMPOSITE POLES

Composites are analysed in a detailed section discussing this technology, applications, advantages and disadvantages, market status and manufacturers. Factors such as safety, pricing, the production processes of filament winding and pultrusion are outlined. The launch market in the United States is reviewed, with the increasing use of composite cross arms on wooden or concrete poles, and the beginning of a move from niche market status to wider take-up. Composites are gaining acceptance in the desert climates of the Middle East. After being spearheaded in Scandinavia, composites are being trialed in other European countries.

Chapter 23 - TYPES OF POLES

The different types of pole are described, with their functions, characteristics and service lives.

Chapter 24 - POLE SPAN

The span between poles is a function of the weight of lines they bear and the density of population beneath them. The design of a network involves a trade-off between longer poles which are more expensive but need fewer accessories, or shorter poles which are cheaper but need more cross-arms and other equipment.

Chapter 25 - SPACE ALLOCATION ON JOINT USE UTILITY POLES

Many utility poles are used by more than one line or service. Conventions exist for the allocation of space on the pole; for transmission lines, sub-transmission lines, distribution lines and telephone lines

Chapter 26 - MANUFACTURERS OF WOOD, STEEL, ALUMINIUM AND CONCRETE POLES

Over 100 companies listed, with profiles of the majors.

Chapter 27 – MANUFACTURERS OF COMPOSITE POLES AND HARDWARE

32 companies listed, with profiles of the majors.

Chapter 28 – CIRCUITS, PHASES AND CONDUCTORS

The basics of circuits and phases are outlined. These have a vital effect on the design and mechanics for towers and poles as well as overhead lines.

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Chapter Summaries

Chapter 29 - RIGHTS OF WAY

ROW - Rights of Way are increasingly scarce and expensive. They are discussed with various alternative schemes outlined.

Chapter 30 - DANGER to AND FROM BIRDS

The danger from birds nesting on or colliding with lines and towers can cause not only harm to the birds but outages to the network. The extent of the problem is analysed, with mitigation and prevention methods outlined.

METHODOLOGY

Towers and Poles Report Ed 9 2021 Table of Contents

Table of Contents

EXECUTIVE SUMMARY.....	10
Definitions and terms for supports.....	18
The functions and types of supporter.....	19
All towers and poles, '000 units.....	19
Global installed base of lattice towers and monopoles for electricity transmission and macro telecoms.....	19
Global installed base utility poles for electricity distribution and telephone lines, streetlights and car par lights.....	20
The market for supporters.....	20
Lattice towers and poles annual sales, units and \$ 2019 to 2026.....	21
Sales of supporters by \$ value in 2020 by type.....	21
Revenue by region, \$ billions.....	22
Demand for poles by pole type.....	23
The impact of Covid-19.....	23
Long term demand trend – New and Replacement.....	24
The value chain – the margin stack.....	24
Types of lattice tower.....	25
The growth of monopoles.....	25
Production and manufacturers of towers and monopoles.....	26
Streetlighting.....	27
Lighting poles in the parking sector.....	27
Passive Safety.....	28
Materials.....	29
Wood.....	29
Steel & aluminium.....	30
Concrete.....	30
Composite.....	30
1.OVERVIEW OF SUPPORTERS - TOWERS AND POLES.....	32
The different infrastructures in which towers and poles are used.....	32
Lattice towers, large monopoles and utility poles – owners and users.....	33
Lattice towers - Transco and MNO.....	34
Lattice towers -transco towers installed base 10.0 million,.....	34
Transco monopoles - installed base 6.9 million.....	34
Telecoms communications macro towers - installed base 5.1 million macro cell stations and MNO lattice towers 1.6 million.....	35
MNO macro monopoles - installed base 1.1 million.....	35
Utility poles installed base - electricity distribution (disco) 944 million poles - landline telephone communications 397 million poles.....	35
Dedicated telecoms small cell poles – 256,000.....	35
Streetlights - installed base 323.3 million.....	35
Car park lights – installed base 29.3 million.....	36
The market for supporters.....	36

Towers and Poles Report Ed 9 2021

Table of Contents

2. ELECTRICITY AND TELECOM LATTICE TOWERS - INSTALLED POPULATION	39
Development of transmission and telecom towers	39
The increase of transmission voltages and its impact on replacement	40
3. ELECTRICITY AND TELECOM LATTICE TOWERS - SALES IN UNITS	48
Sales of transmission and telecom lattice towers in units, 2020	48
Sales of transmission and telecom lattice towers in units, 2019-26	55
4. SALES OF TRANSMISSION AND TELECOM LATTICE TOWERS IN NOMINAL \$ VALUE	61
The comparison of real and nominal value	61
5. ELECTRICITY, TELEPHONE, STREETLIGHT & CAR PARK POLES - INSTALLED POPULATION	68
Utility poles- electricity and telephone	68
Streetlights	68
Central management system (CMS)	70
Car parks	70
Telecoms small cell poles	70
Passive safety	71
Installed pole population by function	71
Installed population by material; wood, concrete, steel, composite	78
6. ELECTRICITY, TELEPHONE, STREETLIGHT & CAR PARK POLES -	
SALES IN UNITS & \$ VALUE Demand for poles	84
7. SALES OF POLES IN UNITS	86
Sales of poles by length; < 40' (12 m), 40-<70' (12-21 m), ≥70' (21 m)	92
Sales of poles by material; wood, steel, concrete, composite	97
Sales of poles in units by region, 2019-26	102
8. SALES OF POLES IN NOMINAL \$ VALUE	109
The comparison of real and nominal value	109
Sales of Sales in nominal \$	109
Sales of poles by length; < 40' (12 m), 40-<70' (12-21 m), ≥70' (21 m)	116
Sales of poles by material; wood, steel, concrete, composite	121
Sales of poles in nominal \$ by region, 2019-26	127
9. THE IMPACT OF COVID-19 ON THE MARKET AND INDUSTRY FOR TOWERS AND POLES	133
The mismatch between government, the media, the electrical utilities and the supply industry	133
Impact of the pandemic	134
The impact on the market has two dimensions, supply and demand	134
North America	134
Europe	135
China	135
India	136
Pakistan	138
South America	138
10. LONG TERM DEMAND CYCLES FOR TOWERS AND POLES	140
Growth of electricity transmission and distribution line networks, telecoms and streetlighting	140
New installations and replacements	140
11. TRANSMISSION - MONOPOLES vs. LATTICE TOWERS	143
United States	143
Europe	144
Netherlands	145

Towers and Poles Report Ed 9 2021

Table of Contents

Scandinavia	147
Denmark	147
Iceland	148
Finland	148
France	148
Germany	148
Switzerland	149
United Kingdom	149
Italy	149
Asia Pacific	150
China	150
Japan and Korea	150
India	150
ASEAN	151
Mongolia	151
Pacific	151
Australia and New Zealand	151
Latin America	151
South Africa	152
Middle East	153
Cost	153
Space requirements	153
Reduction of the electromagnetic field	154
Foundations	155
12. TYPES OF TOWER OR PYLONS	157
Suspension tower	157
Tension towers	158
Angle suspension tower	158
Termination or dead-end towers, also called tension towers	158
Transposition towers	158
Tower Installation	158
1. Build-up or piecemeal method	159
2. Section method	159
3. Ground assembly method	159
4. Helicopter method	159
Elements of lattice tower design	159
13. SERVICE LIFE AND MAINTENANCE OF STEEL LATTICE TOWERS AND MONOPOLES	164
Service Life	164
Maintenance	164
Phase 1 – Coffee Stain Rust	165
Phase 2 – Abrasive Rust	165
Phase 3 – Extensive Abrasive Rust	166
Phase 4 – Crash	166

Towers and Poles Report Ed 9 2021

Table of Contents

14. COMPETITIONS FOR TRANSMISSION POLE DESIGN	168
15. NATIONAL MARKETS FOR UTILITY POLES - ELECTRICITY AND TELEPHONE	171
United States	171
The history of utility poles.....	171
Other materials for utility poles	172
Europe	173
Austria.....	174
Cyprus	174
Czech Republic.....	174
Finland.....	174
France.....	174
Germany.....	175
Greece.....	175
Ireland.....	175
Netherlands	175
Norway.....	175
Spain	175
Sweden.....	175
Switzerland	176
United Kingdom:	176
Russia.....	176
Asia Pacific	177
Japan.....	177
China	177
India.....	178
Korea.....	178
Singapore and Macau.....	178
Australia.....	178
Middle East	178
Saudi Arabia	179
UAE	179
Oman.....	179
Africa	179
16. STREETLIGHTING	180
The world stock of streetlights.....	181
17. PARKING.....	183
United States	183
Europe	184
China	184
Japan.....	185
Global parking revenues	187
Lighting poles in the parking sector.....	188
18. PASSIVE SAFETY	191
The main categories of passive safety road equipment.....	191
Passive safety pole types.....	192
Safe materials	192
Frangible pole types.....	193
Breakaway and slip-base poles.....	193
Growth of electricity transmission & distribution line networks, telecoms and streetlighting	271
New installations and replacements	272

Towers and Poles Report Ed 9 2021

Impact-absorbing poles.....	193
High energy absorbing (HE):.....	194
Low Energy absorbing (LE).....	195
Non Energy absorbing (NE).....	195
The origins of the passive safety concept.....	195
Passive Safety in the EU.....	196
EU National regulations	197
Norway.....	197
Finland.....	197
Sweden.....	197
Belgium.....	198
Netherlands	198
United Kingdom	199
Slovenia.....	199
United States	199
19. UTILITY POLE MATERIALS AND SERVICE LIFE - TRADITIONAL MATERIALS	
WOOD, STEEL, CONCRETE	201
Materials	201
Use	201
Description.....	202
Size classification.....	202
H5 - H1	202
1-5	202
6-10	203
Materials	203
Wood	203
Wood preservatives	205
Pollution from wood preservatives - Leaching	205
Steel	205
Concrete.....	206
Spun and cast concrete poles	207
Composites- fibreglass.....	208
Disposal	209
Wood poles service life	210
Maintenance	211
Ground line Treatment.....	212
Internal Treatment.....	213
Concrete poles service life	213
Steel poles service life	213
Composite poles service life.....	213
20. COMPOSITE POLES.....	214
Introduction	214
Development of composite technology and poles in the US	214
Price/cost	214
Safety factor.....	215
Materials for composites and the manufacturing processes	215
Filament winding	215
Pultrusion.....	216
Testing composites	216
Scandinavian trials of composites	217

Towers and Poles Report Ed 9 2021

Table of Contents

Statnett Norway	217
UK.....	218
Advantages of composite poles	219
Composite and fibreglass maintenance.....	220
Service life of composites and other materials	220
Hardware modifications.....	220
Modular Poles	221
21. TYPES OF POLES	222
Other equipment	224
Grounding rod	224
Dead-end (anchor or termination) poles.....	224
Physical access	224
Construction Classifications	225
22. POLE SPAN.....	226
23. SPACE ALLOCATION ON JOINT USE UTILITY POLES	228
Supply Space.....	228
Safety Zone Space	229
Communications Space	230
Typical communications cables.....	230
24. MANUFACTURERS OF TOWERS AND POLES - STEEL, WOOD, CONCRETE.....	231
China	232
Lattice tower manufacturers.....	232
Poles.....	233
India.....	233
Towers.....	233
Poles.....	235
Malaysia.....	235
Pacific.....	236
Australia.....	236
Poles.....	236
North America	237
Lattice towers.....	237
Poles.....	238
South America	239
Brazil.....	239
Towers and poles.....	239
Europe	240
Netherlands	241
Sweden.....	241
United Kingdom	241
Middle East.....	241
Towers and poles.....	241
Africa	242
Poles.....	242
African manufacturers	242
Kenya	243
Demand	271

Towers and Poles Report Ed 9 2021

Table of Contents

25. MANUFACTURERS OF COMPOSITE POLES AND HARDWARE	244
United States	244
Cross arms	246
Europe	247
Middle East	248
India	248
China	249
26. CIRCUIT PHASES AND CONDUCTORS	251
Single circuit	251
Double circuit	252
Multiple conductors	252
Restrictions on multiple use of corridors	255
27. RIGHTS OF WAY	256
Multiple use of ROWs	260
28. DANGER TO AND FROM BIRDS	262
Extent of the problem	262
The mechanics of an electrocution	265
Mitigation and prevention of collisions	267
Mitigation and prevention of electrocution	267
METHODOLOGY	269
The installed base and demand	269
The model of the demand cycle	269
Different segments of the tower and pole population	269
Creation of the databases of electricity transmission towers and distribution poles	269
Telephone poles	270
Streetlights	271
Car Parking lights	271

Illustrations

Illustration 1: European countries installing new EHV monopoles.....	145
Illustration 2: Some new designs being installed in Europe.....	145
Illustration 3: New 400 kV monopole designs in the Netherlands	146
Illustration 4: New EHV poles in Scandinavia	147
Illustration 5: New 400 kV transmission monopoles in Denmark.....	147
Illustration 6: Mobile lift maintenance	148
Illustration 7: Iceland new 220 kV transmission towers.....	148
Illustration 8: New 400 kV and 275 kV transmission monopoles in the United Kingdom.	149
Illustration 9: A camouflaged 400 kV transmission monopole in the United Kingdom	149
Illustration 10: Terna and 380 kV monopoles.....	150
Illustration 11: New 380 kV monopole in Dubai	153
Illustration 12: Reduction of electromagnetic fields and space requirements	155
Illustration 13: Economy of foundations.....	155

Towers and Poles Report Ed 9 2021

Illustration 14: Suspension tower, single steel pole	157
Illustration 15: Lattice steel suspension tower (L6 used in the United Kingdom)	158
Illustration 16: Installation of transmission tower by helicopter	159
Illustration 17: Phase 1 – Coffee Stain Rust	165
Illustration 18: Phase 2 – Abrasive Rust	165
Illustration 19: Phase 3 – Abrasive Rust	166
Illustration 20: Phase 3 – The tower falls.....	166
Illustration 21: The BOLD competition winner, 2018	168
Illustration 22: STRAW, winner of the Statnett competition, 2018.....	169
Illustration 23: Winner of the UK competition, 2011.....	169
Illustration 24: Pole design offered by National Grid	170
Illustration 25: The Land of Giants, Iceland, Choi & Shine	170
Illustration 26: Early poles in the United States	171
Illustration 27: The Detroit railroad concrete catenary structure.....	173
Illustration 28: Early use of granite telephone poles in Switzerland.....	176
Illustration 29: Utility pole in Japan.....	177
Illustration 30: A Stobie pole in Australia	178
Illustration 31: A mechanical parking structure	187
Illustration 32: 60 mph crash test with 114 mm post.....	191
Illustration 33: Slip-base poles.....	193
Illustration 34: Impact absorbing pole.....	194
Illustration 35: Wood joint use pole in the USA.....	204
Illustration 36: Decorative Wood light pole in the USA	204
Illustration 37: Decorative Wood light pole by Tehomet in Europe, a Valmont subsidiary	205
Illustration 38: Union Metal steel pole installation, 1927 and 2018	206
Illustration 39: A Stobie pole in Australia, electricity and streetlight	208
Illustration 40: Decay in a wood utility pole.....	212
Illustration 41: A nest of poles for shipment	221
Illustration 42: Double-circuit, 138-kV line on wood structures.....	222
Illustration 43: Double-circuit, 138-kV line on galvanized steel poles.....	222
Illustration 44: Single-circuit 138-kV line on weathering steel.....	223
Illustration 45: H-frame wood structure.....	223
Illustration 46: Poles for single phase line in Laos	227
Illustration 47: Tower for single circuit, three phase system (three conductors)	251
Illustration 48: Tower for double circuit, three phase system (six conductors).....	252
Illustration 49: Tower for multiple circuits, three phase system (twelve conductors).....	253
Illustration 50: Multiple lines, lattice towers and monopoles in same corridor	254
Illustration 51: A distribution line right of way	256

Towers and Poles Report Ed 9 2021

Illustration 52: A wetland-scrub/shrub-dominated community the first year after a mow.....	256
Illustration 53: A grass-dominated community in an agricultural matrix	257
Illustration 54: Blue crane electrocuted in South Africa.....	262
Illustration 55: White storks in their nest on a utility pole in Vladeni in Romania	263
Illustration 56: Distribution pole with symmetric chevron (arrow) bird exclusion device	268
Illustration 57: Dedicated nesting pole next to distribution pole with bird exclusion device	268

Figures

Figure 1: The global population of towers and poles in 2020 by primary user/owner.....	33
Figure 2: Lattice towers and poles annual sales, units and \$ 2019 to 2026.....	36
Figure 3: Sales of supporters by \$ value in 2020 by type	37
Figure 4: The global growth of transmission and telecoms towers from 1950 to 2020.	40
Figure 5: The evolution of transmission line voltage, the first introductions	41
Figure 6: Sales of lattice towers in real 2020 and nominal \$	61
Figure 7: Road length and streetlights	69
Figure 8: Demand for poles by function, 2020	84
Figure 9: Demand for poles by pole length, 2020	85
Figure 10: Demand for poles by material, 2020.....	85
Figure 11: Sales of poles in real 2020 and nominal \$.....	109
Figure 12: Installed base of poles and annual demand in million poles, 1900 to 2050	140
Figure 13: Demand for poles, new and replacement 1900 to 2050	141
Figure 14: New additions and replacements of poles with a 35-year service life, 1900 to 2040 .	142
Figure 15: The market for lattice towers and poles in the USA, \$, 2017	144
Figure 16: Comparison of the footprint of a monopole versus a lattice tower.....	154
Figure 17: Peak and Cage of a Transmission Tower.....	161
Figure 18: Cross Arm and Body of a Transmission Tower	161
Figure 19: 220-kV single-circuit LST	162
Figure 20: 500-kV single-circuit LST	162
Figure 21: 220-kV double-circuit LST	162
Figure 22: 500-kV double-circuit LST	163
Figure 23: The principle of exponential corrosion.....	164
Figure 24: Road length and streetlights	180
Figure 25: Stock of streetlights in the world 2018 to 2025.....	181
Figure 26: Comparison of the numbers of motor vehicles and available parking spaces in three of China's largest cities	185
Figure 27: Classification of parking as aces in Japan	186
Figure 28: HE, LE and NE passive safety poles performance in a collision	195

Towers and Poles Report Ed 9 2021

Table of Contents

Figure 29: Percentage share of road deaths per road type (2007-2009 average) ranked by the percentage share of road deaths on a rural roads and motorways taken together	196
Figure 30: Outline of potential decay patterns	211
Figure 31: Space allocations on a joint utility pole	228
Figure 32: Supply space on a utility pole	229
Figure 33: Safety Zone Space on a utility pole	230
Figure 34: The Communications Space in a utility pole.....	230
Figure 35: An example of a single ROW corridor.....	257
Figure 36: An example of parallel transmission ROW corridor.....	258
Figure 37: Typical European right of way cross section, self-supporting tower.....	259
Figure 38: Typical European right of way cross section, guyed tower.....	259
Figure 39: Right-of-way comparison for equivalent capacity of 765-kV and 345-kV lines	260
Figure 40: An example of a pole-mounted transformer.....	266
Figure 41: Installed base of poles and annual demand in million poles, 1900 to 2050	272
Figure 42 Demand for poles, new and replacement 1900 to 2050.....	273
Figure 43: New additions and replacements of poles with a 35 year service life, 1900 to 2040 .	274

Tables

Table 1: The functions and types of supporter.....	32
Table 2: Sales in 2020 as a % of 2019 sales in units by region	37
Table 3: Installed population of transmission and telecom lattice towers by region, 2020.....	39
Table 4: Installed population of transmission and telecom lattice towers by country, Europe, 2020.....	41
Table 5: Installed population of transmission and telecom lattice towers by country, CIS, 2020 .	42
Table 6: Installed population of transmission and telecom lattice towers by country, Middle East, 2020.....	43
Table 7: Installed population of transmission and telecom lattice towers by country, North Africa, 2020.....	43
Table 8: Installed population of transmission and telecom lattice towers by country, Sub-Saharan Africa, 2020	44
Table 9: Installed population of transmission and telecom lattice towers by country, Asia, 2020	45
Table 10: Installed population of transmission and telecom lattice towers by country, Pacific, 2020	46
Table 11: Installed population of transmission and telecom lattice towers by country, North America, 2020	46

Towers and Poles Report Ed 9 2021

Table of Contents

Table 12: Installed population of transmission and telecom lattice towers by country, South America, 2020	46
Table 13: Installed population of transmission and telecom lattice towers by country, Central America, 2020	47
Table 14: Sales of transmission and telecom lattice towers in units by region, 2020	48
Table 15: Sales of transmission and telecom lattice towers in units by country, Europe, 2020....	48
Table 16: Sales of transmission and telecom lattice towers in units by country, CIS, 2020	49
Table 17: Sales of transmission and telecom lattice towers in units by country, Middle East, 2020	50
Table 18: Sales of transmission and telecom lattice towers in units by country, North Africa, 2020	50
Table 19: Sales of transmission and telecom lattice towers in units by country, Sub-Saharan Africa, 2020.....	50
Table 20: Sales of transmission and telecom lattice towers in units by country, Asia, 2020	52
Table 21: Sales of transmission and telecom lattice towers in units by country, Pacific, 2020.....	52
Table 22: Sales of transmission and telecom lattice towers in units by country, North America, 2020	53
Table 23: Sales of transmission and telecom lattice towers in units by country, South America, 2020	54
Table 24: Sales of transmission and telecom lattice towers in units by country, Central America, 2020	54
Table 25: Sales of transmission and telecom lattice towers in units by region, 2019-26.....	55
Table 26: Sales of transmission and telecom lattice towers in units by country, Europe, 2019-26	55
Table 27: Sales of transmission and telecom lattice towers in units by country, CIS, 2019-26	56
Table 28: Sales of transmission and telecom lattice towers in units by country, Middle East, 2019-26	56
Table 29: Sales of transmission and telecom lattice towers units by country, North Africa, 2019-26	56
Table 30: Sales of transmission and telecom lattice towers in units by country, Sub-Saharan Africa, 2019-26.....	57
Table 31: Sales of transmission and telecom lattice towers in units by country, Asia, 2019-26...	58
Table 32: Sales of transmission and telecom lattice towers in units by country, Pacific, 2019-26	58
Table 33: Sales of transmission and telecom lattice towers in units by country, North America, 2019-26	59
Table 34: Sales of transmission and telecom lattice towers in units by country, South America, 2019-26.....	59

Towers and Poles Report Ed 9 2021

Table of Contents

Table 35: Sales of transmission and telecom lattice towers in units by country, Central America, 2019-26.....	60
Table 36: Sales of transmission and telecom lattice towers in nominal \$ by region, 2019-26	61
Table 37: Sales of transmission and telecom lattice towers in nominal \$ by country, Europe, 2019-26	62
Table 38: Sales of transmission and telecom lattice towers in nominal \$ by country, CIS, 2019-26.....	63
Table 39: Sales of transmission and telecom lattice towers in nominal \$ by country, Middle East, 2019-26	63
Table 40: Sales of transmission and telecom lattice towers in nominal \$ by country, North Africa, 2019-26	63
Table 41: Sales of transmission and telecom lattice towers in nominal \$ by country, Sub-Saharan Africa, 2019-26	64
Table 42: Sales of transmission and telecom lattice towers in nominal \$ by country, Asia,	65
Table 43: Sales of transmission and telecom lattice towers in nominal \$ by country, Pacific, 2019-26	66
Table 44: Sales of transmission and telecom lattice towers in nominal \$ by country, North America, 2019-26	66
Table 45: Sales of transmission and telecom lattice towers in nominal \$ by country, South America, 2019-26.....	67
Table 46: Sales of transmission and telecom lattice towers in nominal \$ by country, Central America, 2019-26.....	67
Table 47: Installed population of poles in units by function and region, 2020	72
Table 48: Installed population of poles in units by function by country, Europe, 2020	72
Table 49: Installed population of poles in units by country, CIS, 2020.....	73
Table 50: Installed population of poles in units by function by country, Middle East, 2020	73
Table 51: Installed population of poles in units by function by country, North Africa, 2020	74
Table 52: Installed population of poles in units by function by country, Sub-Saharan Africa, 2020.....	74
Table 53: Installed population of poles in units by function by country, Asia, 2020	75
Table 54: Installed population of poles in units by function by country, Pacific, 2020	76
Table 55: Installed population of poles in units by function by country, North America, 2020	77
Table 56: Installed population of poles in units by function by country, South America, 2020	77
Table 57: Installed population of poles in units by function by country, Central America, 2020 ..	77
Table 58: Installed population of poles in units by function and region, 2020	78
Table 59: Installed population of poles in units by material by country, Europe, 2020	78
Table 60: Installed population of poles in units by material by country, CIS, 2020	79
Table 61: Installed population of poles in units by material by country, Middle East, 2020	79

Towers and Poles Report Ed 9 2021

Table 62: Installed population of poles in units by material by country, North Africa, 2020	80
Table 63: Installed population of poles in units by material by country, Sub-Saharan Africa, 2020	80
Table 64: Installed population of poles in units by material by country, Asia, 2020	81
Table 65: Installed population poles in units by function by country, Pacific, 2020	82
Table 66: Installed population of poles in units by material by country, North America, 2020	82
Table 67: Installed population of poles in units by material by country, South America, 2020	82
Table 68: Installed population of poles in units by material by country, Central America, 2020	83
Table 69: Sales of poles in units by function and region, 2020	86
Table 70: Sales of poles in units by function by country, Europe, 2020	86
Table 71: Sales of poles in units by country, CIS, 2020	87
Table 72: Sales of poles in units by function by country, Middle East, 2020	87
Table 73: Sales of poles in units by function by country, North Africa, 2020	88
Table 74: Sales of poles in units by function by country, Sub-Saharan Africa, 2020	88
Table 75: Sales of poles in units by function by country, Asia, 2020	89
Table 76: Sales of poles in units by function by country, Pacific, 2020	90
Table 77: Sales of poles in units by function by country, North America, 2020	90
Table 78: Sales of poles in units by function by country, South America, 2020	91
Table 79: Sales of poles in units by function by country, Central America, 2020	91
Table 80: Sales of poles in units by length and region, 2020	92
Table 81: Sales of poles in units by length by country, Europe, 2020	92
Table 82: Sales of poles in units by length by country, CIS, 2020	93
Table 83: Sales of poles in units by length by country, Middle East, 2020	93
Table 84: Sales of poles in units by length by country, North Africa, 2020	93
Table 85: Sales of poles in units by length by country, Sub-Saharan Africa, 2020	94
Table 86: Sales of poles in units by length by country, Asia, 2020	95
Table 87: Sales of poles in units by length by country, Pacific, 2020	95
Table 88: Sales of poles in units by length by country, North America, 2020	96
Table 89: Sales of poles in units by length by country, South America, 2020	96
Table 90: Sales of poles in units by length by country, Central America, 2020	96
Table 91: Sales of poles in units by material and region, 2020	97
Table 92: Sales of poles in units by material by country, Europe, 2020	97
Table 93: Sales of poles in units by material by country, CIS, 2020	98
Table 94: Sales of poles in units by material by country, Middle East, 2020	98
Table 95: Sales of poles in units by material by country, North Africa, 2020	99
Table 96: Sales of poles in units by material by country, Sub-Saharan Africa, 2020	99
Table 97: Sales of poles in units by material by country, Asia, 2020	100
Table 98: Sales of poles in units by function by country, Pacific, 2020	101
Table 99: Sales of poles in units by material by country, North America, 2020	101

Towers and Poles Report Ed 9 2021

Table of Contents

Table 100: Sales of poles in units by material by country, South America, 2020	101
Table 101: Sales of poles in units by material by country, Central America, 2020	102
Table 102: Sales of poles in units by region, 2019-26.....	102
Table 103: Sales of poles in units by country, Europe, 2019-26.....	103
Table 103: Sales of poles in units by country, CIS, 2019-26	104
Table 104: Sales of poles in units by country, Middle East, 2019-26	104
Table 105: Sales of poles in units by country, North Africa, 2019-26.....	104
Table 106: Sales of in units by country, Sub-Saharan Africa, 2019-26	104
Table 107: Sales of poles in units by country, Asia, 2019-26.....	106
Table 108: Sales of poles in units by country, Pacific, 2019-26.....	107
Table 109: Sales of poles in units by country, North America, 2019-26.....	107
Table 110: Sales of poles in units by country, South America, 2019-26	107
Table 111: Sales of poles in units by country, Central America, 2019-26	108
Table 112: Sales of poles in nominal \$ by function and region, 2020.....	109
Table 113: Sales of poles in nominal \$ by function by country, Europe, 2020	110
Table 114: Sales of poles in units by country, CIS, 2020.....	111
Table 115: Sales of poles in nominal \$ by function by country, Middle East, 2020.....	111
Table 116: Sales of poles in nominal \$ by function by country, North Africa, 2020	112
Table 117: Sales of poles in nominal \$ by function by country, Sub-Saharan Africa, 2020	112
Table 118: Sales of poles in nominal \$ by function by country, Asia, 2020	113
Table 119: Sales of poles in nominal \$ by function by country, Pacific, 2020	114
Table 120: Sales of poles in nominal \$ by function by country, North America, 2020	114
Table 121: Sales of poles in nominal \$ by function by country, South America, 2020	115
Table 122: Sales of poles in nominal \$ by function by country, Central America, 2020.....	115
Table 123: Sales of poles in nominal \$ by length and region, 2020.....	116
Table 124: Sales of poles in nominal \$ by length by country, Europe, 2020.....	116
Table 125: Sales of poles in nominal \$ by length by country, CIS, 2020	117
Table 126: Sales of poles in nominal \$by length by country, Middle East, 2020.....	117
Table 127: Sales of poles in nominal \$ by length by country, North Africa, 2020.....	118
Table 128: Sales of poles in nominal \$ by length by country, Sub-Saharan Africa, 2020	118
Table 129: Sales of poles in nominal \$by length by country, Asia, 2020	119
Table 130: Sales of poles in nominal \$ by length by country, Pacific, 2020	120
Table 131: Sales of poles in nominal \$ by length by country, North America, 2020.....	120
Table 132: Sales of poles in units by length by country, South America, 2020.....	120
Table 133: Sales of poles in nominal \$ by length by country, Central America, 2020	121
Table 134: Sales of poles in nominal \$ by material and region, 2020	121
Table 135: Sales of poles in nominal \$ by material by country, Europe, 2020	122
Table 136: Sales of poles in nominal \$by material by country, CIS, 2020.....	122

Towers and Poles Report Ed 9 2021

Table 137: Sales of poles in nominal \$ by material by country, Middle East, 2020	123
Table 138: Sales of poles in nominal \$ by material by country, North Africa, 2020	123
Table 139: Sales of poles in nominal \$ by material by country, Sub-Saharan Africa, 2020	123
Table 140: Sales of poles in nominal \$ by material by country, Asia, 2020	124
Table 141: Sales of poles in nominal \$ by function by country, Pacific, 2020	125
Table 142: Sales of poles in nominal \$ by material by country, North America, 2020	125
Table 143: Sales of poles in nominal \$ by material by country, South America, 2020	126
Table 144: Sales of poles in nominal \$ by material by country, Central America, 2020	126
Table 145: Sales of poles in nominal \$ by region, 2019-26	127
Table 146: Sales of poles in nominal \$ by country, Europe, 2019-26	127
Table 147: Sales of poles in nominal \$ by country, CIS, 2019-26	128
Table 148: Sales of poles in nominal \$ by country, Middle East, 2019-26	128
Table 149: Sales of poles in nominal \$ by country, North Africa, 2019-26	128
Table 150: Sales of poles in nominal \$ by country, Sub-Saharan Africa, 2019-26	129
Table 151: Sales of poles in nominal \$ by country, Asia, 2019-26	130
Table 152: Sales of poles in nominal \$ by country, Pacific, 2019-26	131
Table 153: Sales of poles in nominal \$ by country, North America, 2019-26	131
Table 154: Sales of poles in nominal \$ by country, South America, 2019-26	131
Table 155: Sales of poles in nominal \$ by country, Central America, 2019-26	131
Table 157: Description and cost of repairs	167
Table 158: Road length and streetlights	181
Table 159: Installed stock of streetlights in the world 2018 to 2025	182
Table 160: Installed base of lighting poles in parking lots by major countries, 2020	188
Table 161: Installed base of lighting poles in parking lots in Europe, 2020	189
Table 162: Annual new and replacement sales of poles for parking lots	190
Table 158: Manufacturers of Towers, with production capacity	231
Table 164: Estimates of the annual number of collision victims with above ground transmission lines (excluding distribution lines) for three different countries.	265
Table 165: The size of large raptors	266

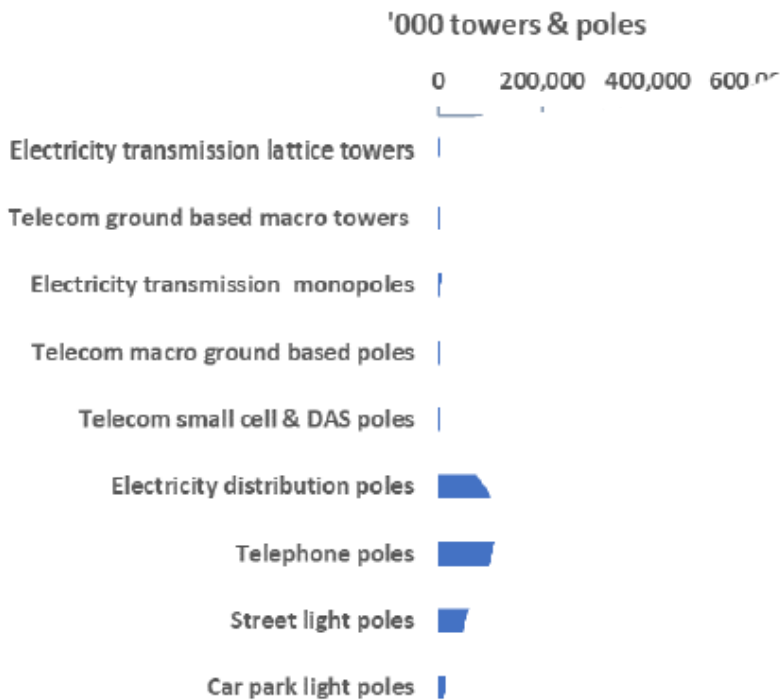
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Supporters are commonly separated into two groups, lattice towers and poles. Lattice towers are used for higher voltages and large 'macro' telecom base stations. Poles are divided into two sub-groups; large poles, often called 'monopoles', for high voltage use and macro telecom stations, and smaller utility poles, which are versatile and perform a number of roles.

The different infrastructures in which towers and poles are used.

- Electricity transmission, sub-transmission - towers and large monopoles
- Electricity distribution - small towers or pylons and utility poles
- Landline telephone communications - utility poles
- Telecoms macro cell base stations - towers
- Telecoms small cell sites - poles
- Cable television
- Street lighting
- Car park lighting

Figure 1: The global population of towers and poles in 2020 by primary user/owner



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Transmission towers outnumber telecoms towers by a large margin, with XX million transmission lattice towers in 2020 and XX million telecoms towers. The telecoms towers are confined to ground based macro stations and do not include rooftop cell sites in this analysis. Rooftops do have some towers and poles in service but we do not have data breaking them down together with those sites without either but with a boxlike structure. Both electricity transmission and telecoms bulk transmitters also employ monopoles, which are included in the chapters dealing with poles as opposed to lattice towers.

Table 4: Installed population of transmission and telecom lattice towers by country, Europe, 2020

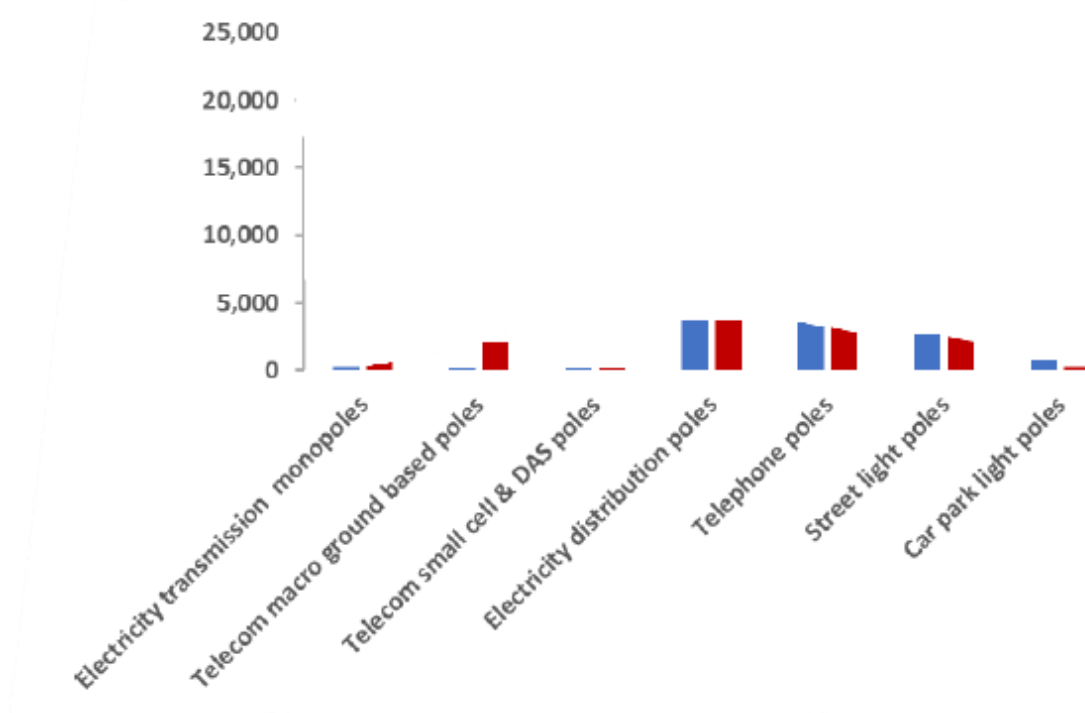
	Electricity transmission	Telecom macro	Total towers
Albania	7,535		
Austria			
Belgium			
Bosnia & Herzegovi.			
Bulgaria			
Croatia			
Cyprus			
Czech Republic			
Denmark			
Estonia			
Finland			
France			
Germany			
Greece			
Hungary			

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In 2020 demand for poles will reach XX million, XX%% of which is in Asia Pacific. In value, Asia Pacific has a lower share with XX%. One third of global demand in units, XX%, in accounted for by two countries, China and the United States. India had a share of XX% in 2019 but this has dropped to XX% in 2020 due to the Coronavirus crisis, which has hit India severely. Brazil has XX%.

Utility poles, including electricity transmission and distribution and telephone poles, account for XX million poles for a value of XX million, or XX% of poles and XX% of the value. Streetlight poles account for XX million poles for a value of \$XX million, or XX% of poles and XX% of the value.

Figure 8: Demand for poles by function, 2020



By far the largest share of poles in terms of length is in the category under 40 feet or 12 metres, amounting to XX% of demand. In value, the smallest size <40 feet (12 metres) and the medium 40-70 feet (12-21 metres)

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MONOPOLES vs. LATTICE TOWERS

There is a clear trend towards the increased use of monopoles for higher voltage transmission but this trend is variable around the world. These will not totally replace lattice towers but where they are chosen they will be installed in new lines and as replacements when lattice towers are due for renewal. A large share of the market for lattice towers will continue.....

Netherlands

In the Netherlands, the transmission operator, Tennet, has started to install monopoles instead of lattice towers. The project was initiated in 2007 and new pylons have been designed by engineers at Tennet, in collaboration with KEMA, the Dutch research company and unusually, in conjunction with appointed architects. Instead of a single lattice tower, the cables are supported by two steel poles up to 65 metres high.

The electromagnetic footprint has been a powerful driver of change in the Netherlands. Based on epidemiological studies of people living near power lines in Sweden and the US, Dutch authorities advise avoiding long-term exposure of children to magnetic fields higher than 0.4 microTesla. To meet such stringent requirements, power line corridors for traditional HV transmission projects would normally have to be some 300 metres wide, meaning major obstacles given the dense infrastructure and public perception of overhead lines and the small area of the Netherlands.

Figure 1: New 400 kV monopole designs in the Netherlands



Source: Tennet

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Table 1: Sales of poles in units by country, Asia, 2019-26

	2019	2020	2021	2022	2023	2024	2025	2026
East Asia								
China								
Hong Kong								
Macau								
Korea, North								
Japan								
Mongolia								
Korea, South								
Taiwan								
East Asia exc China								
South-East Asia								
Brunei								
Cambodia								
Indonesia								
Laos								
Malaysia								
Myanmar								
Philippines								
Singapore								
Thailand								
Timor-Leste								
Vietnam								
Southeast Asia								
Southern Asia								
India								
Afghanistan								
Bangladesh								
Bhutan								
Maldives								
Nepal								
Pakistan								
Sri Lanka								
South Asia exc India								
Total Asia								

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NATIONAL MARKETS FOR ELECTRICITY AND TELEPHONE DISTRIBUTION POLES

United States

The United States is one of the largest single markets for utility poles with an installed base estimated at XXX million. XX% are owned by electrical utilities, XX% by telecoms companies and XX% by railways.....

Europe

Around 2,400 electricity distribution companies distribute electricity to customers in the EU. Eurelectric, the association for the European electrical industries is a strong proponent of wooden utility poles. The use of wooden poles in distribution networks has kept its position within electricity networks. These have come under fire in recent years for environmental reasons because of preservatives, creosote in particular. The European impregnation industry has for over 60 years been producing creosote poles according to industry guidelines and national standards, the WEI specifications but wood preservatives.....

.....

France

In France electricity distribution poles are mainly wood or concrete. Out of XXX wooden poles installed each year, XX% are treated with creosote (source: ERDF). Other DSOs still using wooden poles (in particular in rural areas). A number of local authorities require the use of wooden poles. France Telecom owns XXX million wood telecoms poles.

Various experiments for constructing reinforced concrete poles were made in Europe, and the first known experiment was made in 1896 by a French engineer

Germany

XX% of electricity poles installed, of which over are wooden, XX% concrete and XX% steel. There are reported to be XXXmillion wooden utility poles in service. Wooden poles, concrete poles, tubular steel poles and steel lattice towers are used for medium-voltage overhead power systems. Concrete pylons are used in Germany normally only for lines with operating voltages below 30kV. In exceptional cases concrete pylons are used also for 110 kV lines, as well as for the public grid or for the railway traction current grid.

Greece

About XX million wooden poles installed in the Greek electricity distribution networks. About XX% of overhead distribution networks' poles are creosote impregnated wooden poles. Every year, about XXX

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new wooden poles are installed in the distribution networks, in new lines or for replacement of damaged poles.

.....

Japan

There are XXX million utility poles in Japan, XX million owned by the EPCOs, the electrical utilities and XX million by NTT the telecoms utility. In Japan, the wood pole market has been shrinking because concrete poles now dominate the utility pole market. Japanese wood poles are limited to use for broadcasting wires in the countryside and as supporting poles for trees. A service life of 15 years is quoted in Japan for wood utility poles. A feature of Japan, and one which surprises many visitors to such an advanced country is the plethora of overhead lines in cities. Unlike most developed cities around the world, where various kinds of cables are kept underground, most Japanese cities have them above ground. The reason for this is that after World War II Japan wanted to bring electricity as quickly as possible to as many people as possible and it was easier and much less expensive and obstructive to do this by putting up utility poles.

.....

THE VALUE CHAIN – THE MARGIN STACK

The cost of any product such as towers and poles, can be measured at a number of stages in the value chain, at the start when it is no more than a piece of unworked ore, to its final installation in working order and finally as a constituent of capital expenditure. At each level in the value chain, value is added and profit margin is 'stacked'. The 'cost of doing business' (CODB) refers to all the expenses incurred by a firm or a sole proprietor in producing and selling goods or services. The 'margin stack' is the total amount of profit charged by the suppliers of materials, transport, sales and any other processes which are part of the final CODB plus the final profit margin. The point of interest in the chain depends on the business of the person who is assessing the value. The value chain starts with the input of raw materials. These inputs, in this case steel, typically constitute from 50-80% of the manufacturing cost of a finished product.

The value chain at 6 levels

1. **BOM, bill of materials** - Metal producers and refiners are concerned about the prices they can get for their output in its basic form, ingots, rods, plates etc. For the equipment manufacturers this price translates into the BOM (bill of materials) as a cost of production. CODB + margin.
2. **Manufactured CODB** - Adding the cost of fabricating the materials into finished products produces the manufactured cost.
3. **Factory gate price (MSP)** - The addition of non-manufacturing costs such as sales and finance costs brings it up to the factory gate price or manufacturer's selling price. This does not include any transport cost. (Note: factory gate price is sometimes quoted with manufacturer's profit margin and sometimes not.) CODB + margin.