Towers and Poles Report Ed 9 2021

Transmission and Telecoms Towers and Monopoles

Utility Poles, Street & Parking Lights

415,000 lattice towers and 63 million utility poles were sold in 2019 for electricity transmission and distribution, telecoms, and street and car park lighting, each falling in 2020 due to Covid-19.

The installed base and annual demand of the tower and pole fleet are analysed by:

- **Geography;** World / 9 Regions / 217 Countries
- **End-user segments**:

Electricity transmission lattice towers	Telecom lattice towers	Electricity transmission monopoles	Telecom macro monopoles	Telecom small cell poles	Electricity distribution poles	Telephone poles	Street-light poles	Car park light poles	Total towers & poles

- **Material**: Wood / Concrete / Steel / Composite
- **Pole length**: ≥70’ (21m) / 40’<70’ (12-21m) / <40’ (12m)
- **Annual demand**; Units and $ value from 2019 to 2026

Covid-19 - Review of impact of the pandemic, regional commentary, analysis of supply and demand.

National market commentary for Utility Poles- Market commentary on installed bases and demand for utility poles in selected countries, with information on numbers and type of pole.

Long term demand cycle The long term demand cycle is charted for new additions and replacements since 1900 and forecast to 2050.

The March of the Monopoles - a growing trend from lattice towers to monopoles is analysed with country reviews.

Street lighting - 323 million street and 29 million parking lights in a vigorous market driven by the conversion to high efficiency LEDs, urbanisation and passive safety.

Parking is an urban priority and escalating population density puts pressure on demand for space. A small market for lighting poles to date but growing……….

Materials are changing - wood remains popular, but growing demand for steel, concrete and composite poles is analysed.

Composite poles industry, market development and production technology, with profiles of the main producers.

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Competitive landscape - The principal vendors are reviewed in a 30 page section, with 102 companies manufacturing towers and poles are listed with brief reviews. The leading producers include - KEC, Valmont, Falcon, Skipper Ltd, Europoles, Mitas, Al-Babtain, Brametal, Europole, Mercur Induo System-Holztechnik GmbH, Bajaj Electrical, Kalpetaru, Al-Yamamah, Shakespeare Composite Structures, Strongwell, RS Technologies, Powertrusion, Duratel, Daji, Qingdao Sinostra, Qingdao, Megatro…....and more.

Passive safety regulation is having a significant impact on some markets - analysis of countries, legislation, the technologies and types of passive safety pole, road segments affected.

The Smart City and street lighting - efficiency, LEDs and the pole market.

Types of lattice tower - 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.

Pole materials and service life - Real versus perceived service life and utility practices.

The Margin Stack - The value chain is a continuous process of adding value, cost and margin to a product. Each part which is outsourced to an external supplier means less profit for the principal manufacturer……the outsourced profits stack up.

Joint use of utility poles - Joint use by different utilities is a significant factor in the pole market. The protocols for space allocation and standards are outlined.

ROW - Rights of Way - A significant cost which can be an obstacle in designing networks and specifying equipment. With increasing pressure on space and environmental constraints, ROWs are becoming more scarce and expensive. ROW is a significant driver in the trend to Monopoles.

Dangers & mitigation of damage to towers and poles by birds - this is not only an issue of animal welfare but also of protecting security of supply.

Methodology - Different methodologies were required for each segment of the pole population. For the largest segment, utility poles, the cumulative installed base grows in a linear trend but demand fluctuates in cycles, consisting of units which are installed in one year, either as additions for expansion of the networks or replacements of aged towers or poles. StatPlan has created databases of the fleets of towers and poles for every country, with historical records from 1900 and new build and replacements are calculated from these records, to create the long-term demand trend. These are reviewed with market intelligence and modified where necessary to estimate short-term sales trends. For other segments populations were established from industry reports and gaps modelled.

271 pages, 43 figures, 57 illustrations, 165 tables

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