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Rental rates mixed

Another year has passed and its time for our annual look at rental rates in the UK and Ireland. This year has been a very mixed bag and as usual the actual data does not always bear out the comments and perception from those working in the industry.

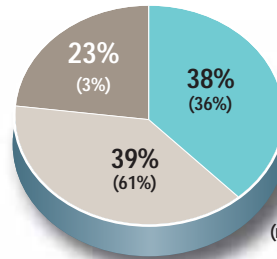
Once again access and telehandler equipment has performed better than the crane rental business. Although the crane numbers are not quite as bad as many participants suggested, some are still dire depending on crane type. It is hard to take a general view over all three sectors - so we will refrain from trying. A big thank you to all of you who participated in this annual look at rates - we very much appreciate it.



Crane rates

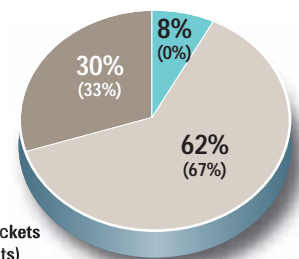
Crane hire rate trends - all types

Crane hire rates over the past 12 months have:



(numbers in brackets = 2011 results)

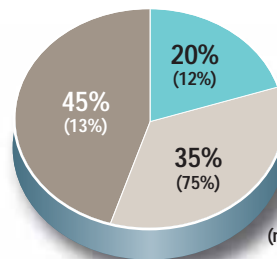
Crane hire rates during the next 12 months will:



The above chart hides the variances between crane types and sizes and as is often the case, the hard numbers do not always gel with the general feeling.

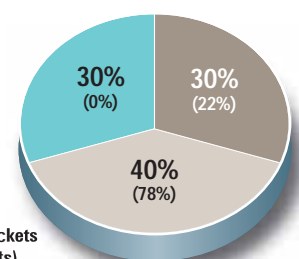
Crane fleet size

Crane fleet size over the past 12 months have:



(numbers in brackets = 2011 results)

Crane fleet size over the next 12 months will:



If you are looking at these numbers in isolation you might be puzzled that only 30 percent of respondents have reduced their fleet size. However the numbers tie up with the strong fleet additions earlier in the year as seen at Vertical Days. It appears as though companies are not as optimistic for the year ahead.



2012 rental rate survey C&a



Crane rental rates

Daily rates for mobile cranes ▲ Up ▼ down - same

Crane Size	Average	Lowest	Highest
Under 30 tonnes	£330 ▼	£305 ▲	£350 ▼
30 to 45 tonnes	£405 ▼	£390 ▲	£425 ▼
50 to 65 tonnes	£560 ▲	£490 ▲	£640 ▲
70 to 85 tonnes	£745 ▲	£700 ▲	£790 ▼
95 to 125 tonnes	£960 ▲	£920 ▲	£995 ▼
135 to 200 tonnes	£1,610 ▲	£1,475 ▲	£1,750 -
210 to 350 tonnes	£2,267 ▲	£1,850 ▲	£3,300 ▲
Over 350 tonnes	£4,495 ▼	£4,250 ▼	£5,000 ▼

Weekly rates for crawler cranes

Crane Size	Average	Lowest	Highest
Up to 50 tonnes	£723 ▼	£700 ▼	£775 ▼
50 to 100 tonnes	£1,202 ▼	£1,000 ▼	£1,350 ▼
100 to 250 tonnes	£1,825 ▼	£1,800 ▼	£2,300 ▼
Over 250 tonnes	No data	No data	No data

Weekly rates for tower cranes

Crane Size	Average	Lowest	Highest
Luffers	£1,045 ▲		
Flat Tops and Saddle Jibs	£625 ▼		
Mobile Self Erectors	£767 ▼	£700 ▼	£1,000 ▼
Self Erecting Tower Cranes	£580 ▲	£530 ▼	£625 ▼

Weekly rates for other cranes

Crane Size	Average	Lowest	Highest
Pick & Carry	£279 ▼	£225 ▼	£375 -
Spider cranes	£691 ▼	£650 ▲	£800 ▼

Note that this year we have added a trend arrow to show how this year's rates compare with last year. Surprisingly many mobile cranes are up on last year, although this could be partially down to the mix of respondents?



Utilisation and returns

Numbers here were all over the place. One surprising result was that mobile cranes under 30 tonnes supposedly give the best return on investment, although one of the worst rates of utilisation! This could relate to the fact that these days smaller cranes are specialist or older, low cost units.

Mobile Cranes

1 - Best 7 - Worst

Crane Size	Best physical utilisation	Best financial return
Under 30 tonnes	5	1
30 to 45 tonnes	2	5
50 to 65 tonnes	3	4
70 to 85 tonnes	1	3
90 to 125 tonnes	3	2
135 to 200 tonnes	4	6
210 to 350 tonnes	6	7
Over 350 tonnes	n/a	n/a

Crawler Cranes

Crane Size	Best physical utilisation	Best financial return
Under 50 tonnes	3	2
50 to 100 tonnes	2	2
100 to 250 tonnes	1	1
Over 250 tonnes	n/a	n/a

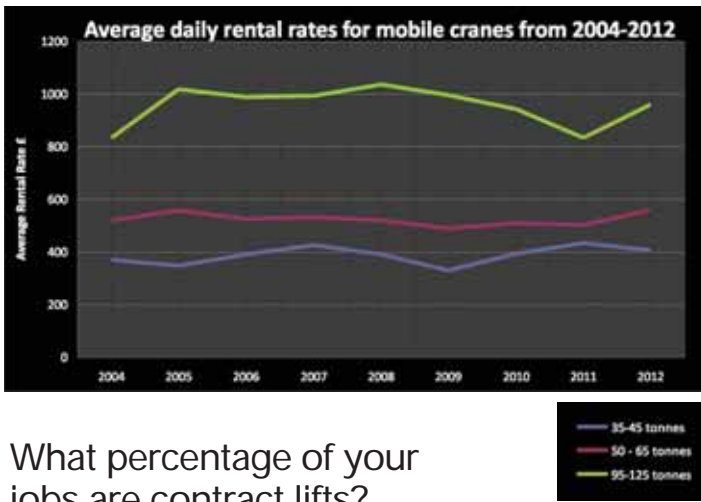
Tower Cranes

Crane Size	Best physical utilisation	Best financial return
Luffers	1	2
Flat Tops/Saddle Jibs	4	4
Self Erectors	3	3
Mobile Self Erectors	1	1

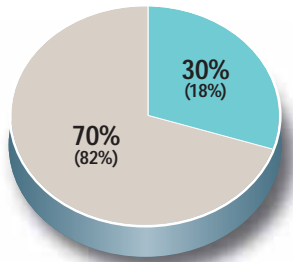
Other Cranes

Crane Size	Best physical utilisation	Best financial return
Pick & Carry	1	1
Spider Cranes	2	2





What percentage of your jobs are contract lifts?

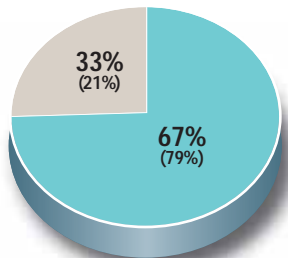


Contract lift Pure crane hire
(numbers in brackets = 2011 results)

A little more progress towards contract lifting suggesting more companies are enforcing the CPA/HSE guidelines.



Who does your Thorough Examinations?



Third party In house
(numbers in brackets = 2011 results)

An interesting development suggesting some companies are bringing inspections back in house.

Respondent's Comments

Rental rates across the fleet have held up and have certainly not reduced any further. There has been better demand for larger self-erecting cranes and as a result the rates have if anything slightly improved at this end of the scale.

There are too many cranes in the country for the amount of work that is required which causes a price war.

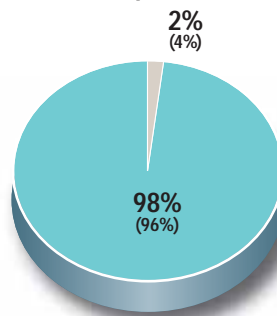
Cranes should not be subject to MOTs but regular safety inspections and regular maintenance.

There is an acceptance in the market and most customers that rates should go up. It will be interesting to see this year with less capacity in the market if our nerve and resolve to increase rates holds.



C&a 2012 rental rate survey

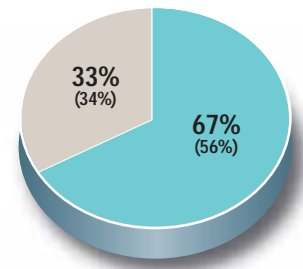
Do you employ any female crane operators?



Yes No
(numbers in brackets = 2011 results)

While this is a significant change it merely reflects the low number of female operators, rather than a trend.

Would you recommend the crane hire industry to your children?



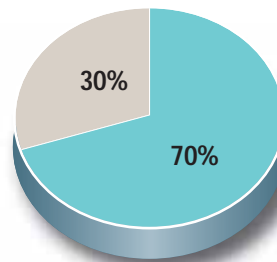
Yes No
(numbers in brackets = 2010 results)

This clearly reflects the general negativity that the industry currently feels.

Additional questions for 2012

Average fleet age: 5 years

Should cranes be subject to an MOT?



Yes No

This is an interesting result and does reflect anecdotal feedback.

There continues to be companies intent on destroying the industry by working at suicidal rates. More often than not the crane driver earns more money than the crane. It's lunacy.

Cranes should be subject to MOT's if the hire rates and costs pass on to the customers and national companies don't get the best benefit from it.

The crane rental rates are about the same as we were getting in 1990 and the cost of the cranes was about 40 percent less that it is now. The only people to blame for this are the Crane Rental Companies, if this continues you will see a lot of casualties within the industry. If clients want first class equipment and service backed up with engineering and RAMS they should realise that they have to pay for this service and it should not be given away for nothing. They should be told at the time of tendering so as they can build this price into their tender.

Small one and two crane companies with no safety or standards and below the radar of the HSE are getting away doing CPA jobs without any paperwork on site. What should be a minimum £850 they are doing for £180 cash in hand. This is causing the industry to rot from within while the HSE turns a blind eye.

This game is now in my opinion the worst it has ever been. I started Peterborough Crane Hire in 1981 and what a waste of time it has been over the past 10 years. The cost of new cranes is now so prohibitive I don't ever see small companies buying new for many years ahead - if ever!

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Our Material Handling Attachments (MHAs) securely store awkward, heavy or bulky materials at height.



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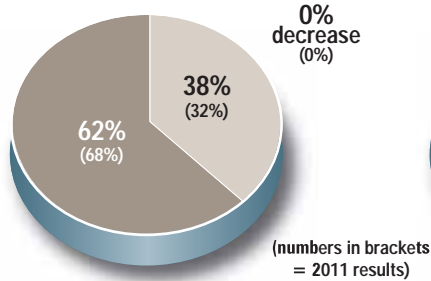
A Lavendon Group Company

Powered Access rates

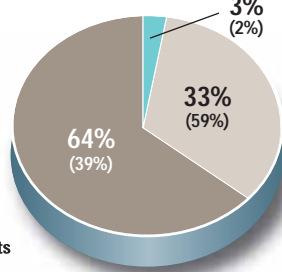
● Decreased ● Stayed the same ● Increased

Rate trends

Access rates over the past 12 months have:



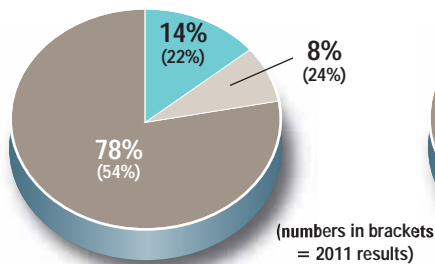
Access rates over the next 12 months will:



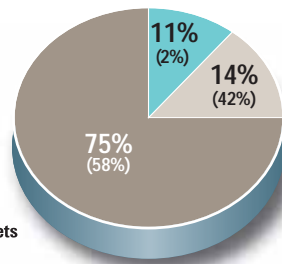
This is an encouraging set of numbers. The comments on last year's numbers did not quite reflect some of the data but this is not unusual as many respondents provide data from their systems but comments based on their overall perceptions. This year's numbers are the opposite of what people expected – 59 percent expected rates to stay the same while only 39 percent thought they would rise. Let's hope that the same does not hold true for this year.

Fleet trends

Fleet size over the past 12 months have:



Fleet size over the next 12 months will:



Our respondents forecasted well last year with 58 percent expecting to expand their fleets in 2012. In the end it was 78 percent, however only two percent expected to reduce the size of their fleets, while in the end 14 percent cut back. This year the forecasts are exceptionally similar to this year's actual results. Hopefully they will prove to be an accurate indicator.



Weekly rental rates by general category

▲ Up ▼ down – same

Platform Height	Average	Lowest	Highest
Under 5 metres	£90 ▼	£75 ▼	£104 ▲
6 metres (19/20ft)	£91 ▼	£80 ▼	£100 ▼
8 metres (26ft)	£116 –	£80 ▼	£140 ▲
9-10 metres (30-34ft)	£138 ▲	£110 ▼	£180 ▲
11-12 metres (34-41ft)	£169 ▼	£130 ▼	£220 ▼
13-17 metres (42-55ft)	£347 ▲	£221 ▼	£450 ▲
Over 17 metres	£410 ▼	£280 ▼	£600 ▲

Push around scissor lifts

Platform Height	Average	Lowest	Highest
3 to 5 metres	£49 ▲	£45 ▲	£55 ▲

Diesel bi-energy scissor lifts

Platform Height	Average	Lowest	Highest
8 metres (26ft)	£138 ▲	£135 ▲	£140 ▼
9-10 metres (30-34ft)	£172 ▲	£137 ▲	£265 ▲
11-12.5 metres (36-42ft)	£190 ▼	£155 ▲	£285 ▲
13-17 metres (43-56ft)	£259 ▼	£194 –	£350 –

Electric self-propelled booms

Platform Height	Average	Lowest	Highest
Under 11 metres (36ft) Industrial	£229 ▲	£195 ▲	£265 ▲
10-12.5 metres (32/40ft)	£228 ▲	£185 ▲	£266 ▼
Over 13 metres (45ft plus)	£214 ▼	£95 ▼	£299 ▼

Mast booms

Platform Height	Average	Lowest	Highest
8 metres	£95 ▼	£75 ▼	£125 ▼
10 metres	£193 ▼	£141 ▼	£225 ▼



Weekly rental rates by general category *continued*

▲ Up ▼ down - same

Rough Terrain articulated booms

Platform Height	Average	Lowest	Highest
12-14 metres (39-45ft)	£237 ▲	£200 ▼	£265 ▼
15-16 metres (49/52ft)	£257 ▲	£203 ▼	£310 ▲
20-23 metres (60-70ft)	£361 ▲	£283 ▼	£487 ▲
24-26 metres (80-85ft)	£513 ▲	£450 ▲	£555 ▲
Over 26 metres	£712 ▼	£501 ▼	£1,125 ▲

Straight telescopic booms

Platform Height	Average	Lowest	Highest
Under 17 metres (40-46ft)	£212 ▼	£200 ▲	£245 ▼
20-23 metres (60-70ft)	£343 ▲	£294 ▼	£491 ▲
24-26 metres (80-85ft)	£487 ▼	£410 ▼	£551 ▲
Over 27 metres	£1,395 ▲	£850 ▲	£2,230 ▲

Trailer lifts

Platform Height	Average	Lowest	Highest
12-13 metres (30-38ft)	£218 -	£170 ▼	£280 ▲
17 metres (56ft)	£521 ▲	£320 ▲	£886 ▲
Over 20 metres	£822 ▼	£730 ▲	£850 -

Spider lifts

Platform Height	Average	Lowest	Highest
Up to 15 metres	£427 ▼	£340 ▼	£525 ▲
16-20 metres	£586 ▼	£400 ▼	£650 ▲
20-33 metres	£980 ▼	£700 ▼	£2,000 ▼
Over 33 metres	£1,580	£1,200	£1,960

Vehicle mounted lifts - Weekly rates

Van mounted lifts

Working Height	Average	Lowest	Highest
Up to 13 metres	£341 ▲	£330 ▲	£350 ▼
13-17 metres	£355 ▲	£330 ▲	£360 ▼
Over 17 metres	£433	£400	£470

Truck mounted lifts

Working Height	Average	Lowest	Highest
Under 27 metres (3.5 tonne)	£215 ▲	£195 ▲	£375 ▲
22-35 metres (7.5 tonne)	£332 ▲	£270 ▲	£500 ▲
36-45 metres	£663 ▲	£600 ▲	£725 ▲
46-70 metres	£944 ▲	£900 ▲	£1,250 ▲
Over 70 metres	No data	No data	No data

The data received is interesting in that some of the sectors that we would have expected to have improved did the opposite, while some rates we understood to have fallen - based on anecdotal information and comments - actually improved. We are also presenting the return on investment data differently, using the average rate of return as a percentage of initial machine cost, as submitted by respondents. The only odd thing that this has thrown up is that 3.5 tonne truck mounted lifts provide the best overall return while last year this sector was third best among truck mounted lifts. This may be down to the fact that physical utilisation for small truck mounted lifts appears to have been high in 2012 and the combination of strong utilisation and daily rates is always a winner.

Utilisation and Returns

Scissor lifts

Type	Utilisation			Rate as % of initial cost		
	Average	Lowest	Highest	Average	Lowest	Highest
Small Electric Scissors	69%	60%	80%	1.3%	1%	1.5%
Electric Scissors 10-20m	64%	51%	75%	1.1%	0.9%	1.3%
Electric Scissors 20m+	67%			0.9%	0.8%	1%
Diesel Scissors 12-20m	62%	48%	76%	0.8%	0.5%	1.2%

Self-propelled booms lifts

Type	Utilisation			Rate as % of initial cost		
	Average	Lowest	Highest	Average	Lowest	Highest
Small Electric Booms	60%	48%	75%	1.2%	1%	1.6%
Industrial Booms	63%	54%	72%	1%	0.8%	1.3%
Articulated Booms	64%	55%	74%	1%	0.7%	1.5%
Articulated Booms 17m+	69%	58%	76%	0.9%	0.6%	1.3%
Straight Telescopic	54%	35%	71%	0.7%	0.6%	0.7%

Spider lifts

Type	Utilisation			Rate as % of initial cost		
	Average	Lowest	Highest	Average	Lowest	Highest
Spider Lifts up to 18m	59%	40%	85%	1.4%	0.9%	2.0%
Spider Lifts over 18 to 30m	48%	10%	80%	1.1%	0.8%	1.5%
Spider Lifts 31m and over	53%	40%	65%	0.9%	0.7%	1.2%

Mast booms

Type	Utilisation			Rate as % of initial cost		
	Average	Lowest	Highest	Average	Lowest	Highest
6 metres	57%	45%	69%	1.4%	1.25%	1.5%
8 metres	60%	50%	71%	1.35%	1.3%	1.4%

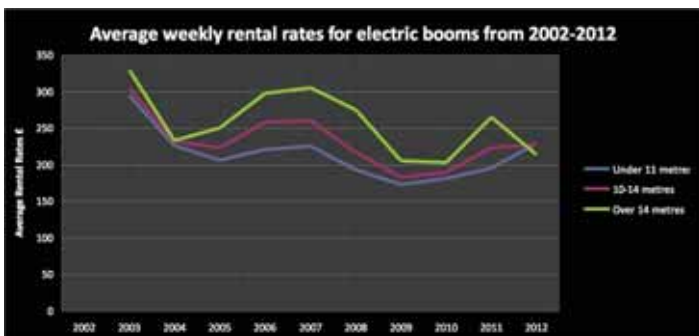
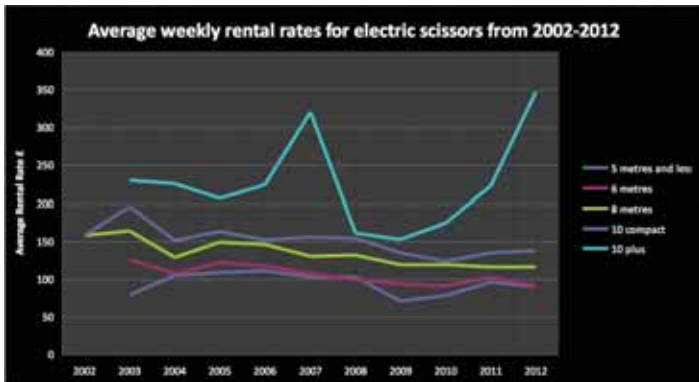


Trailer lifts

Type	Utilisation			Rate as % of initial cost		
	Average	Lowest	Highest	Average	Lowest	Highest
Under 11 metres industrial	49%	45%	56%	1.9%	1.5%	2.4%
10-12.5 metres (32/40ft)	47%	31%	60%	1.7%	1.5%	1.9%
Over 14 metres (45ft plus)	45%	34%	55%	2.1%	1.5%	3%

Truck mounted lifts

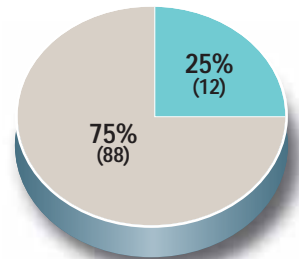
Type	Utilisation			Rate as % of initial cost		
	Average	Lowest	Highest	Average	Lowest	Highest
Under 27 metres (3.5 tonne)	80%	75%	85%	3%	2.5%	3.3%
22-35 metres (7.5 tonne)	78%	50%	98%	1.2%	0.9%	1.5%
36-45 metres	77%	75%	78%	1.5%	1.4%	1.7%
46-70 metres	66%	53%	75%	1.3%	0.9%	1.7%
Over 70 metres	72%	55%	81%	1.6%	1.5%	1.8%



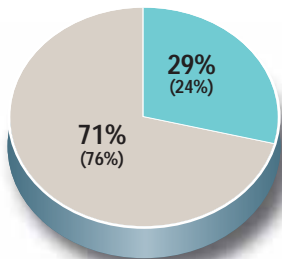
Who does the six monthly LOLER inspections on your machines?

The trend towards third party inspections continues which is encouraging.

● Third party
● In house
 (numbers in brackets = 2011 results)

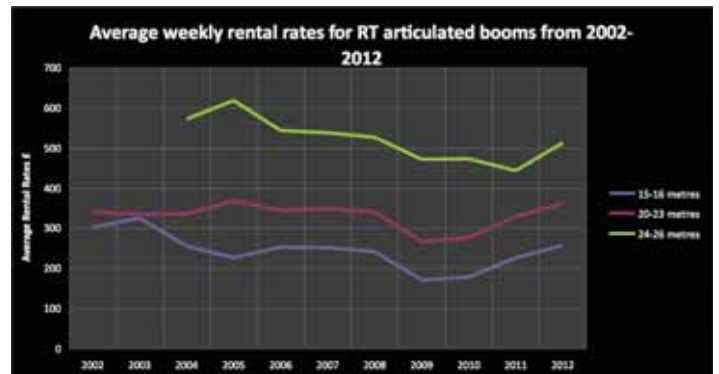


Would you recommend the access rental business to your children?



Given the positive feedback this year it is surprising to see this number come in lower than last year. However it is hardly statistically meaningful and remains at a very high level.

● Yes
● No
 (numbers in brackets = 2011 results)





Respondent's Comments

Given the hard summer (July - October) and some companies having a panic when it got quiet, it has not been too bad a year. The PLCs who talk so much about rate discipline and yields have been guilty of give-away pricing on some jobs where we have come up against them.

I have put yes to a raise on rates across the board as we recently had a 2.8% increase across the board that didn't cause too much fuss if you know what I mean. Fleet size is growing but slowly. The best returns are on the push arounds but they are quite problematic as batteries and chargers are always an issue plus they don't tend to have the same shelf life as say a small electric scissor. So if you looked at the P&L over the life of the machine it would probably work out approximately the same as a small electric scissor in regards to return on investment. We tend to get good one and two day rates so have tried to put this into the percentage return overall.

We have had more record weeks and months this year than ever but the year as a whole is only slightly better than 2011. I'm not complaining though, we just need to move rates up again next year to reflect extra costs we all face such as fuel, new machine prices etc...

The area we feel is suffering most pressure is the market serviced by one particular company with Dutch ownership as they are spoiling the 'well over 1%' weekly returns we have normally enjoyed (and expect) from Holland Lift products. The diesel market, albeit quite busy, carries on as normal and offers pathetic returns. A bout of price increases has seen the cost of a 45' diesel boom rise from £29k in 2009 to £34k in Jan 2013. But some still think that £180 per week (.53% return) is acceptable. Even the finance costs on 60 months payments comes to more than we get from £180 per week at 75% utilisation. It's now time we all grew up and started behaving like responsible people. We shouldn't have to run our companies on the basis that our small high return kit subsidises the poor return big stuff.

With the tool hire companies and the market leader trying to lock smaller companies out of the big job sites with special deals and trumped up technical barriers I am worried that 'outsiders' will fight harder over the rest.

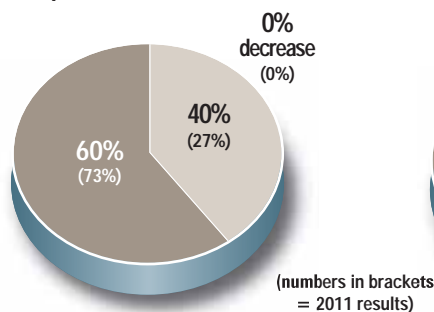


Telescopic Handler rental rates

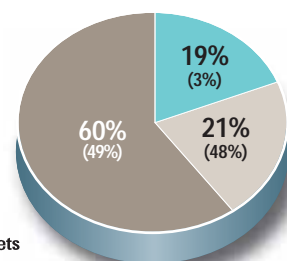
Rate trends



Telehandler rates over the past 12 months have:



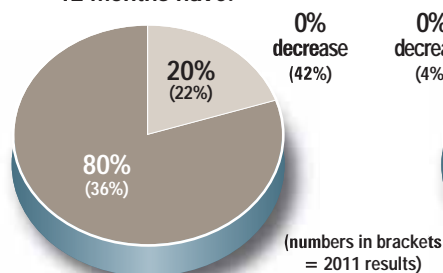
Telehandler rates over the next 12 months will:



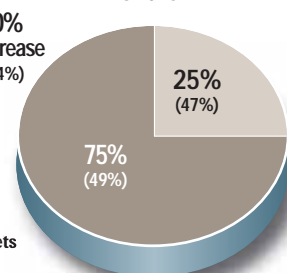
The returns this year indicate a slowing in the improvements seen in the last two to three years, which is understandable. However the actual data collected suggests that rates overall have been mixed with the average in many fixed frame sectors falling over the past 12 months. Looking forward it is interesting to see that 19 percent think that rates will fall in 2013.

Fleet size

Fleet size over the past 12 months have:



Fleet size over the next 12 months will:



With improved availability rental companies have been adding to their fleets and this may be a factor putting a brake on rate growth? With house building still at historically low levels there is still plenty of growth potential in the market. It is interesting to note that this time last year only 49 percent of respondents expected to increase their fleets, while an almost similar number planned to simply maintain their fleet size.



Weekly rates for telehandlers

▲ Up ▼ down - same

Fixed frame	Average	Lowest	Highest
Lift height			
Under 5 metres	£230	£190	£295
5 - 7 metres	£246 ▼	£210 ▲	£285 ▼
7 - 10.5 metres	£261 ▼	£235 ▼	£280 ▼
11 - 13.5 metres	£278 ▼	£265 ▼	£300 ▼
13.5 - 15 metres	£308 ▼	£285 ▼	£350 ▼
15.5 - 18 metres	£389 ▲	£325 ▲	£450 -

360 degree

Size	Average	Lowest	Highest
Under 20 metres	£642 ▲	£600 -	£725 ▲
20 - 25 metres	£970 ▲	£880 ▼	£1,100 -
Over 25 metres	£1,303 ▲	£1,200 ▲	£1,450 ▲

Return on investment

1 = best
6 = worst

Type and lift height	Best return on investment
Fixed frame	
Under 5 metres	6
5 to 7 metres	1
7 to 10.5 metres	3
11 to 13.5 metres	5
13.5 to 15 metres	2
15.5 to 18 metres	4
360 degrees	
Under 20 metres	3
20 to 25 metres	1
Over 25 metres	2



C&a 2012 rental rate survey

What % of your rental contracts go out with work platform attachments?

▲ Up ▼ down - same

Size	Average	Lowest	Highest
Under 20 metres	7% ▲	0% -	15% ▼
20 to 25 metres	34% ▲	0% ▼	70% ▲

Average age of your fleet

Average	Lowest	Highest
7 years	0 years	15 years



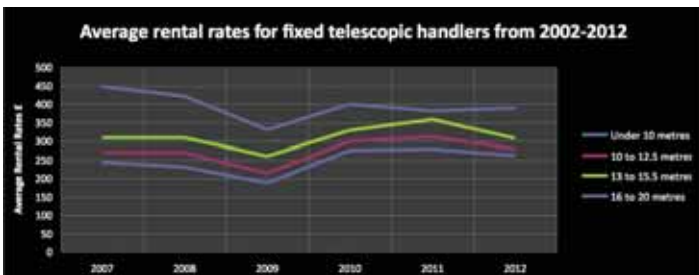
Respondent's Comments

We as a company have over the past two years moved away from the cut-throat hire rates associated with supplying the leading house builders due to rate cutting from the two major players in the telehandler market. We have continued to supply specified machines tailored to the customers' demands and this has helped on the rates.

It's been a good year all round but we've seen the odd wobble here and there... I am not sure that 2013 will be as good, some of the discounters have been gearing up again... I just hope that we can keep supply and demand in balance.

I am wondering if we have not all missed the chance to push rates to levels where we can turn a decent margin without needing such high utilisation levels?

With on-going increases in capital costs from manufacturers, it is now time that rental companies started to act and increase rates across all sectors.



Who does the Thorough Examination inspections for your machines?

● Third party ● In house
 (numbers in brackets = 2011 results)

