

SAFE INNOVATIVE LIFTING SOLUTIONS

WHY CHOOSE AINSCOUGH CRANE HIRE

Our comprehensive fleet powered by HVO, features a wide variety of cranes that allows us to deliver a comprehensive package of safe lifting services that can be adapted to both project requirements and location.

MAKE THE SAFE CHOICE

We created Make the Safe Choice using our team's experience of delivering safe crane lifts over the last 40-plus years – it is our proven approach to a safe system of work, understanding potential dangers, identifying them and responding appropriately.



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www.ainscough.co.uk



BRIGHTER TIMES AHEAD?

After several years of turmoil with the pandemic and rapidly rising prices there is some positivity in the UK and Ireland crane, access and telehandler rental markets. The good news is that there appears to be plenty of business and rental rates are finally rising... perhaps not as quickly as required to cover increases in costs or to restore decades of stagnant rates, but they are certainly a step in the right direction.

A common comment that recurs every year is that in spite of strong demand which encourages prudent companies to hold rates at sensible levels, there are still those that undercut massively usually leaving 'cash on the table' across all three sectors.

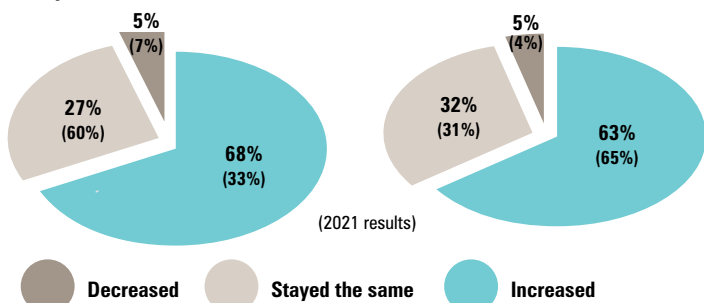
The 'flavour of the year' larger electric platforms and battery powered cranes are generating growing demand from environmentally conscious contractors or carbon neutral sites but few seem willing to pay the premium required. Simply put, many customers like the idea of clean and quiet but are not willing to pay for it!



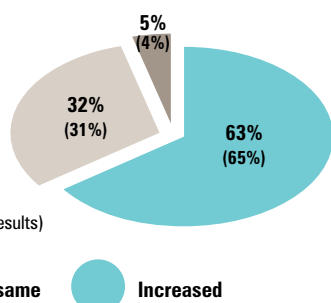
CRANE RATES

Crane rate trends - all types

Crane hire rates over the past 12 months have:



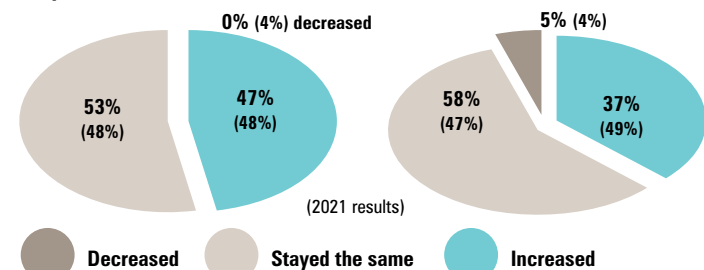
Crane hire rates during the next 12 months will:



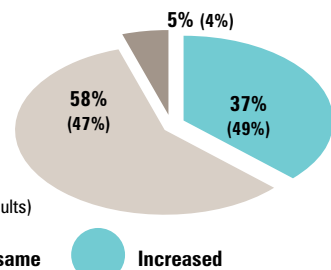
2022 was certainly more positive than 2021 with more than two thirds of respondents stating that rates had increased, while 27% said they remained the same and just 5% that they had fallen. These figures are almost exactly in line with the rate predictions made by our respondents last year. This year's predictions show similar rate positivity with 63% predicting a rate rise and 32% remaining the same... but with inflation running above 10% the magnitude of the improvement will be critical

Crane fleet size

Crane fleet sizes over the past 12 months have:



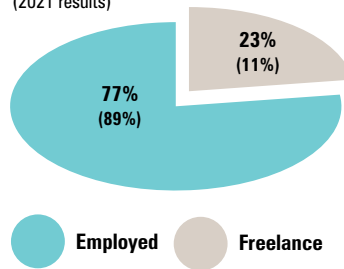
Crane fleet sizes over the next 12 months will:



The results are very similar to last year with almost half of the companies increasing their fleet size and the remainder staying the same. This year there is more emphasis on fleet sizes staying the same or even reducing - a product of rising prices and long lead times?

What percentage of your operators are?

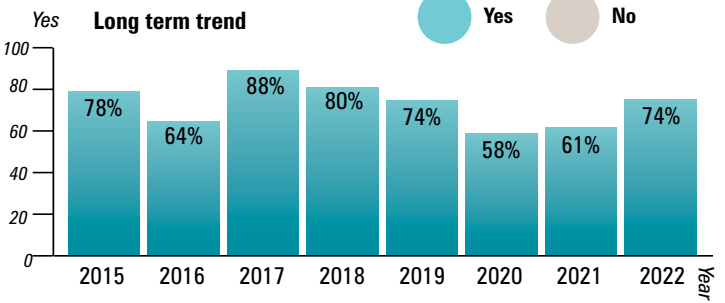
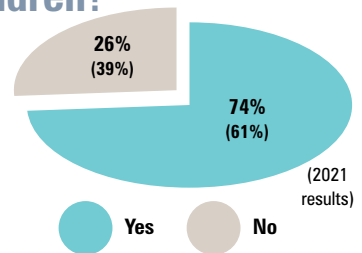
(2021 results)



The figures this year suggest a shift towards more freelance operators (23%) compared to 11% last year. During the pandemic period the percentage of 'employed operators' increased as many sought job security but post pandemic coupled with the growing shortage of skilled operators many seem happier to have more flexibility.

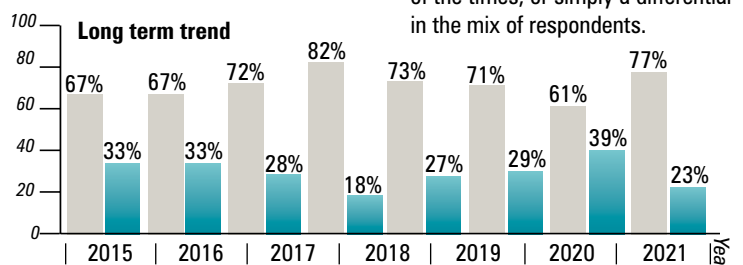
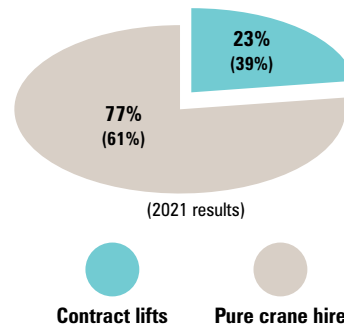
Would you recommend the crane hire industry to your children?

A significant rise in this 'tell-tale' indicator of the times, with the majority happy to recommend the crane hire business for their children, reversing the downward trend from the 2017 high of 88%.



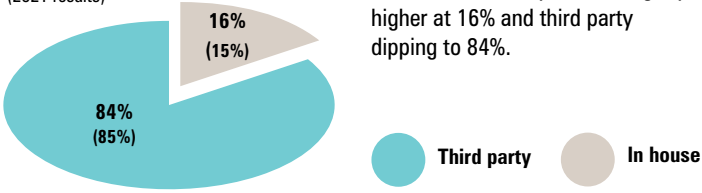
What percentage of your jobs are contract lifts?

The trend towards more contract lifts has quite significantly reversed for the first time since 2018 with only 23% of jobs being contract lifts and more than three quarters pure crane hire. This may be a sign of the times, or simply a differential in the mix of respondents.



Who does your Loler Thorough Examinations?

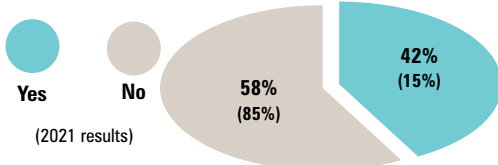
(2021 results)



Not much change since last year, with 'In House' inspections slightly higher at 16% and third party dipping to 84%.

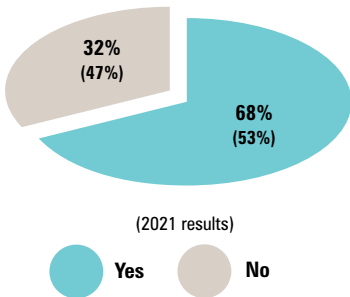


Do you employ any female crane operators?



A surprising, and almost unbelievable result with just under half of companies saying they employed female crane operators. Although these figures are similar to what we saw in 2021 they do not match with our experience. It is true however that more women are finding work as crane operators, especially on tower cranes and crawlers, rather than on day to day mobile contracts.

Should cranes be subject to MOT's?



A significant swing towards cranes being subjected to MOTs with more than two thirds supporting formal road worthiness inspections. It is not far short of its peak of 72% in 2015 which may indicate the CPA voluntary programme may need strengthening or simply be a swing back following some midterm negativity that arose.



CRANE RENTAL RATES

From last year rates have gone ▲ up ▼ down — same ND no data

Daily rates for mobile cranes

Crane size	Average (£)	Lowest	Highest	Ideal
Up to 30 tonnes	£616 ▲	£510 ▲	£850 ▲	£675 ▲
30-45 tonnes	£618 ▲	£500 —	£750 ▲	£731 ▲
50-65 tonnes	£769 ▲	£690 ▲	£950 ▲	£888 ▼
70-90 tonnes	£956 ▲	£800 ▲	£1,150 ▲	£1,138 ▼
100-120 tonnes	£1,400 ▲	£1,000 ▲	£1,900 ▲	£1,538 ▲
130-160 tonnes	£1,733 ▲	£1,500 ▲	£2,200 ▼	£2,000 —
160-200 tonnes	£2,117 ▲	£1,400 ▼	£2,950 ▼	£2,333 ▼
210-250 tonnes	£2,525 ▲	£1,750 —	£2,900 ▼	£2,967 ▼
260 -350 tonnes	£4,067 ▼	£2,800 ▼	£4,900 ▼	£5,586 ▲
360-490 tonnes	£6,550 ▲	£4,000 ▼	£10,000 ▲	£8,522 ▲
500-600 tonnes	£6,864 ▲	£5,000 ▲	£8,100 ▼	£9,826 ▲
610 - 750 tonnes	£10,833 ND	£6,000 ND	£18,200 ND	£14,341 ND
Self-Erecting Tower (4-5 axles)	£1,917 ▲	£1,450 ▲	£2,300 ▲	£2,200 —
Self-Erecting Tower (6-7 axles)	£2,467 ▲	£2,000 ▲	£2,800 ▲	£2,500 ▲

Weekly rates for crawler cranes

Crane size - operated	Average (£)	Lowest	Highest	Ideal
Up to 60 tonnes	£2,090 ▲	£1,000 —	£2,800 ▲	£2,560 ▼
70-80 tonnes	£2,717 ▲	£2,600 ▲	£2,800 ▲	£2,938 ▲
90 -100 tonnes	£2,725 ▲	£2,750 ▲	£3,100 ▲	£2,938 ▼
120-170 tonnes	£2,800 ▲	£2,000 ▼	£3,100 ▼	£3,338 ▼
180 - 250 tonnes	£3,650 ▼	£3,500 ▲	£4,100 ▼	£4,425 ▼
260-350 tonnes	£4,950 ▲	£4,900 ▲	£5,000 ▲	£5,600 ▼
360 - 500 tonnes	£6,250 ND	£5,500 ND	£7,000 ND	£7,500 ND
550 - 750 tonnes *	£12,500 ND	£10,000 ND	£15,000 ND	£15,500 ND
Over 750 tonnes *	£30,000 ND	£27,500 ND	£31,000 ND	£35,000 ND

* Superlift +£2,000 -£3,000



Weekly rates for tower cranes

Flat tops and saddle jibs	Average (£)	Lowest	Highest	Ideal
Up to 70 tonnes/metres	£1,150 ▲	£1,100 ▲	£1,200 ▲	£1,150 ▲
120 tonnes/metres	£1,000 ▲	£800 ▼	£1,250 ▲	£1,226 ▼
200 tonnes/metres	£1,600 ▲	£1,500 ▲	£1,800 ▲	£1,817 ▲
300 tonnes/metres	£2,117 ▲	£1,650 ▲	£2,350 ▲	£2,422 ▲
Luffers	Average (£)	Lowest	Highest	Ideal
Less than 70 tonnes/metres	£1,157 ▼	£1,100 ▲	£1,350 ▼	£1,331 ▼
100 tonnes/metres	£1,329 ▼	£1,000 ▼	£1,750 ▼	£1,520 ▼
180 tonnes/metres	£1,993 ▲	£1,500 ▲	£2,500 ▲	£2,033 ▲
300 tonnes/metres	£3,850 ▲	£3,700 ▲	£4,000 ▲	£4,200 ▲
Self Erectors	Average (£)	Lowest	Highest	Ideal
Self Erectors	£830 ▼	£650 ▼	£1,100 ▼	£924 ▼

Weekly rates of other cranes

Crane size	Average (£)	Lowest	Highest	Ideal
Pick & Carry < 2.5 tonnes	£925 ▲	£850 ▲	£1,000 ▲	£1,220 ▲
Pick & Carry 3-5 tonnes	£1,350 ▲	£1,200 ▲	£1,500 —	£1,681 ▲
Pick & Carry 5.5-10 tonnes	£974 ▼	£725 —	£1,350 ▲	£1,833 ▲
Pick & Carry > 10 tonnes	£1,050 ▼	£850 ▲	£1,250 ▲	£1,967 ▼
Mini crawlers > 12 tonnes	£1,550 ▲	£1,200 ▲	£1,800 ▼	£1,836 ▼
Spider cranes < 1 tonne	£788 ▲	£600 ▲	£1,200 ▲	£1,493 ▲
Spider cranes 2-5 tonnes	£1,050 ▲	£850 ▲	£1,250 ▲	£1,410 ▲
Spider cranes > 5 tonnes	£1,350 ▲	£1,200 ▲	£1,500 ▼	£1,722 ▼

Average fleet age in years

Average	Lowest	Highest
5.8 (5.7)	3 (2.5)	15 (10)

The average fleet age has increased slightly to 5.8 years, according to our respondents, possibly due rising costs and interest rates, but more likely the long lead times for new cranes, up to three years for some models.



UTILISATION AND PERCENTAGE OF INITIAL COST

Mobile cranes

Crane size	Utilisation			Trend
	Average	Lowest	Highest	
Up to 30 tonnes	76%	50%	95%	▼
30-45 tonnes	77%	70%	90%	▼
50-65 tonnes	80%	75%	90%	▼
70-90 tonnes	87%	75%	100%	▲
100-120 tonnes	80%	60%	100%	▲
130-160 tonnes	80%	60%	100%	▲
160-200 tonnes	80%	60%	100%	▲
210-250 tonnes	55%	50%	65%	▼
260 -350 tonnes	51%	40%	60%	▼
360-490 tonnes	57%	45%	65%	▲
500-600 tonnes	58%	55%	68%	▲
Over 600 tonnes	46%	30%	60%	▼
Self-erctng twr (4-5 axles)	66%	55%	75%	—
Self-erctng twr (6-7 axles)	93%	90%	100%	▲

Crawler cranes

Crane size	Utilisation			Trend
	Average	Lowest	Highest	
Up to 60 tonnes	73%	50%	90%	▲
70-80 tonnes	83%	75%	90%	▲
90 -100 tonnes	89%	75%	100%	▲
120-170 tonnes	90%	90%	90%	▲
180 - 250 tonnes	90%	90%	90%	▲
260-350 tonnes	90%	90%	90%	▲
360 - 500 tonnes	ND	ND	ND	ND
Over 500	ND	ND	ND	ND

Tower cranes

Flat tops and saddle jibs	Utilisation			Trend
	Average	Lowest	Highest	
Up to 70 tonnes/metres	85%	80%	100%	▲
120 tonnes/metres	65%	50%	100%	▼
200 tonnes/metres	84%	75%	100%	▲
300 tonnes/metres	59%	30%	80%	▼

Luffers	Utilisation			Trend
	Average	Lowest	Highest	
Less than 70 tonnes/metres	95%	80%	100%	▲
100 tonnes/metres	85%	75%	100%	▲
180 tonnes/metres	58%	20%	80%	▼
300 tonnes/metres	80%	80%	80%	▼

Self Erectors	Utilisation			Trend
	Average	Lowest	Highest	
Self Erectors	81%	70%	100%	▲

Other cranes

Crane type	Utilisation			Trend
	Average	Lowest	Highest	
Pick & Carry < 2.5 tonnes	60%	60%	70%	▼
Pick & Carry 3-5 tonnes	60%	60%	75%	▼
Pick & Carry 5.5-10 tonnes	61%	50%	70%	—
Pick & Carry > 10 tonnes	62%	55%	70%	—
Mini crawlers < 12 tonnes	65%	55%	70%	▲
Spider cranes < 1 tonne	62%	40%	75%	▲
Spider cranes 2-5 tonnes	68%	60%	80%	▲
Spider cranes > 5 tonnes	69%	60%	75%	▼

CRANE RESPONDENT'S COMMENTS

While companies were reticent to provide raw data, they were certainly forthcoming when it came to comments. Here are just a few of them:

Rates are (FINALLY) moving upwards - and quite quickly. Driven by inflation & low-availability users are expecting to pay more & owners are more inclined to hold their nerve. Operator costs - owners are, at last, realising that the operator should not be taking the lion's share of the rate. Increased interest rates - after many years of money being so cheap that the race-to-the-bottom might finally be over as owners who could previously get away with piss-poor rates are now being forced to charge more to cover their repayments.

We are continuing to push the ceilings on rental rates, the change in attitude and confidence of the crane owners is starting to make a difference.

Struggle to keep rates high as competitors are still undercutting.

I believe that crane fleet sizes will fall during 2023/24 and rental rates will increase.

Rates have improved or you best put 'increased' but so have running costs...

The rental rates must increase inline with increased equipment and labour costs.

Rates need to increase, they need to reflect the level of investment required in order to supply the quality of equipment the contractors require.

Rates for units between 40 tonne and 90 tonne capacity's remain static.

Units between 100te to 250te capacity have increased slightly but still need to go up.

In the last 6 months rates for cranes in excess of 400t capacity have risen to roughly where they were in 2014 but still need to rise further.

Rates for cranes between 250t to 400t capacity are on the rise.

There are still some companies that are renting cranes out at rates that are suicidal.

Unfortunately companies in Europe are bringing in old cranes into the UK and renting them out at rates far below the market price or value.

I do believe that rates will increase during 2023 mainly due to the labour shortage and upkeep costs.

Finally some sense creeping in, more companies will drop out in the year ahead leaving some gaps in the market.

Fortunately others are trying to increase the rates but still below where they require to be.

The market for tower cranes appears to be resilient at the moment but we are preparing for a slow down in 2023.

During 2016 and until 2021 the rental companies let the rates drop and by 2022 some of them suddenly realised that the rates that they were quoting or receiving did not cover their overheads.



We are in a period of hyperinflation and our industry is adversely affected. This is against a backdrop of 10-15 years where rental rates and therefore pay rates have not kept up with other sectors. Pay rates for operators needs to increase quickly and dramatically in order to retain and attract and therefore rental rates will need to increase above the rate of inflation to support this.

THE NEW TEC-RANGE

#REACHANYTHING

The previous TEC range was built from the best ideas. Now PALFINGER is going one step further. Our know-how with all the advantages of the previous crane ranges and the experience of our operators has been further developed into a completely new generation. It supports PALFINGER customers even better with outstanding performance and new comfortable assistance systems. A dream come true – TEC at its best!

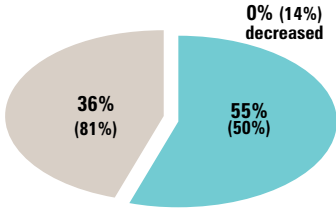


POWERED ACCESS RATES

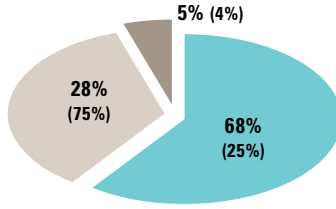
Rate trends



Access rates over the past 12 months have:



Access rates during the next 12 months will:



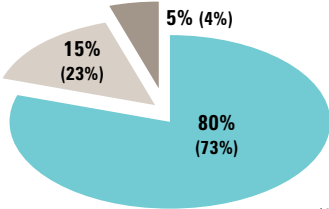
(2021 results)

The UK/Irish powered access market appears to be going through a period of change and disruption? The good news is that more than half of our respondents reported an increase in rental rates last year, with the rest saying that they stayed the same. The respondents' comments, however, seems to contradict the data. That is not unheard of... we have seen differences between perception, anecdotal evidence and the data before. However, the respectable rate rises do not come close to covering the higher costs, which include power, transport and the price of equipment. It still looks as though there are too many rental companies relying on rate cutting, than top level service and well trained hire desk staff. Having said that almost two thirds of companies think that rates will increase this year although a small number are predicting that they will fall. It could be an interesting year.

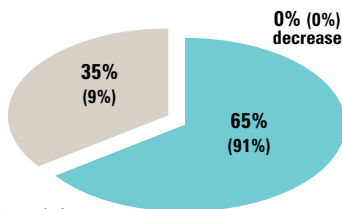


Fleet trends

Fleet sizes over the past 12 months have:



Fleet sizes over the next 12 months will:

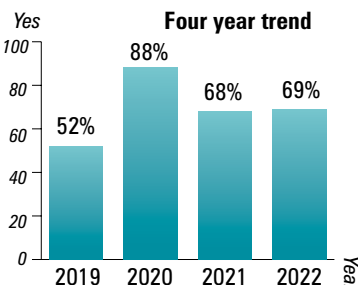
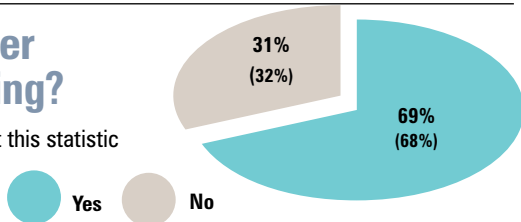


(2021 results)

The vast majority of companies expanded their fleets last year, although not quite as high as they predicted at the end of 2021. Five percent actually slimmed down their fleets, possibly driven by high used equipment prices while 15% simply maintained the status quo. There is a little less confidence in fleet growth this year however none of companies that responded predicted a reduction in fleet numbers.

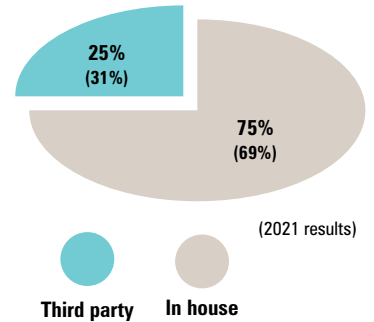
Do you offer IPAF training?

As you might expect this statistic was almost static.



Who does your LOLER Thorough Examinations?

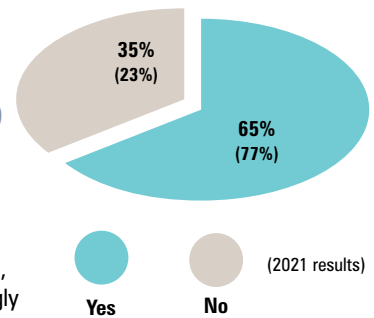
There has been a significant swing among our respondents towards In House inspections rather than use a third party, returning to the same levels we reported in 2020.



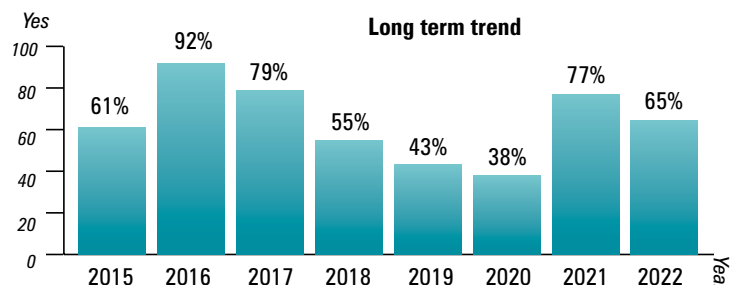
(2021 results)

Would you recommend the access industry to your children?

The uncertainty in the sector with rates not keeping up with costs and the challenge of finding good people, are possible factors in the surprisingly large negative trend when it comes to recommending the industry to their children.



(2021 results)



Average fleet age in years

The average fleet age has remained roughly the same at five years/60 months, however the oldest fleet reported this year was eight years compared to 11 last year. Long lead times, price increases and the failure of one or two companies with old machines, may also have played a part.

Average	Lowest	Highest
5 (5)	3 (2)	8 (11)



Spider lifts

Working Height	Average (£)	Lowest	Highest	Ideal
Up to 15 metres	£482 ▲	£245 ▼	£650 ▲	£625 ▼
16-20 metres	£842 ▲	£650 ▲	£1,000 ▲	£950 ▼
21-26 metres	£1,210 ▲	£950 ▲	£1,300 ▲	£1,333 ▼
27-30 metres	£1,617 ▲	£1,500 ▲	£1,750 ▲	£1,650 ▼
31-35 metres	£2,166 ▲	£1,800 ▲	£2,500 ▲	£2,243 ▲
Over 35 metres	£2,017 ▲	£1,850 ▲	£2,200 ▼	£2,700 ▼

Van mounts - Weekly rates

Working Height	Average (£)	Lowest	Highest	Ideal
Up to 14 metres	£397 ▲	£325 ▲	£725 ▲	£800 ▲
Over 15 metres	£510 ▼	£430 ▼	£650 ▲	£759 ▲

Truck mounts - Daily rates

Working Height	Average (£)	Lowest	Highest	Ideal
Up to 25 metres (3.5 tonne) no operator	£226 ▲	£155 ▲	£420 ▲	£323 ▲
22-35 metres (7.5 tonne) with operator	£568 ▲	£440 ▲	£685 ▲	£670 ▲
36-45 metres with operator	£725 ▲	£600 ▲	£900 ▲	£888 ▲
46-60 metres with operator	£1,250 ▲	£1,050 ▲	£1,400 ▲	£1,550 ▲
61-70 metres with operator	£1,666 ▲	£1,450 ▲	£1,750 ▲	£1,850 ▲
Over 70 metres with operator	£2,400 ▲	£2,300 ▲	£2,500 ▲	£2,775 ▲

WEEKLY RENTAL RATES BY GENERAL CATEGORY

From last year rates have gone

▲ up ▼ down — same

Push around lifts

Working Height	Average (£)	Lowest	Highest	Ideal
Push Around Lifts (PopUps)	£53 ▼	£40 ▼	£65 ▼	£80 ▲
Portable Push Around (AWP/UL)	£143 ▲	£50 ▼	£300 ▲	£213 ▲

Trailer lifts

Working Height	Average (£)	Lowest	Highest	Ideal
12-16 metres (30-47ft)	£252 ▲	£185 ▲	£350 ▲	£325 ▲
17-19 metres (49-55ft)	£320 ▲	£250 ▲	£450 ▲	£425 ▲
Over 20 metres (65ft)	£300 ▼	£250 ▲	£350 ▼	£512 ▲

Mast booms

Working Height	Average (£)	Lowest	Highest	Ideal
8 metres	£160 ▲	£130 ▲	£200 ▲	£250 ▲
10 metres	£293 ▲	£210 ▲	£550 ▲	£382 ▲
12 metres	£327 ▲	£230 ▲	£450 ▲	£491 ▲



Electric self-propelled scissor lifts

Platform Height	Average (£)	Lowest	Highest	Ideal
Up to 5 metres	£82 ▲	£55 ▼	£130 ▲	£113 ▲
6 metres (19/20ft)	£104 ▲	£75 ▲	£130 ▲	£139 ▲
8 metres (26ft)	£130 ▲	£90 ▲	£200 ▲	£165 ▲
9-10 metres (30-33ft)	£167 ▲	£120 ▼	£230 ▲	£199 ▲
11-12 metres (36-39ft)	£212 ▲	£150 ▲	£400 ▲	£276 ▲
13-17 metres (42-55ft)	£334 ▲	£230 ▲	£500 ▲	£425 ▲
18-22 metres (60-72ft)	£540 ▲	£460 ▲	£600 ▼	£817 ▲
23-25 metres (75-82ft)	£733 ▲	£650 ▲	£850 ▲	£750 ▼
26-30 metres (86-100ft)	£983 ND	£850 ND	£1,200 ND	£1,126 ND
Over 30 metres (over 100ft)	£1,750 ND	£1,500 ND	£2,000 ND	£1,680 ND



Diesel/bi-energy scissor lifts

Platform Height	Average (£)	Lowest	Highest	Ideal
8 metres (26ft)	£148 ▲	£130 ▲	£169 ▲	£184 ▲
9-10 metres (30-33ft)	£188 ▲	£175 ▲	£200 ▲	£222 ▲
11-12.5 metres (36-42ft)	£198 ▲	£150 —	£250 ▲	£248 ▼
13-17 metres (42-55ft)	£255 ▲	£180 ▲	£300 —	£343 ▲
18-22 metres (60-72ft)	£775 ▲	£700 ▲	£850 ▲	£920 ▲
23-25 metres (75-82ft)	£1,275 ND	£1,250 ND	£1,300 ND	£1,400 ND
26-30 metres (86-100ft)	£1,600 ND	£1,600 ND	£1,600 ND	£2,000 ND
Over 22 metres (72ft)	£2,375 ND	£2,250 ND	£2,500 ND	£2,950 ND



Electric self-propelled booms

Platform Height	Average (£)	Lowest	Highest	Ideal
Up to 11 metres (ind.)	£228 ▲	£180 ▲	£255 ▲	£258 ▲
10-12 metres (32-40ft) (Nifty/AB38)	£249 ▲	£180 ▲	£300 ▲	£268 ▼
14-16 metres (45-53ft)	£307 ▲	£210 ▲	£400 ▲	£398 ▲
Over 16 metres (over 54ft)	£430 ND	£300 ND	£450 ND	£398 ND



Rough Terrain articulated booms

Platform Height	Average (£)	Lowest	Highest	Ideal
12-14 metres (39-45ft)	£250 ▲	£225 ▲	£290 ▲	£297 ▲
15-16 metres (49-52ft)	£284 ▲	£210 ▼	£330 ▲	£361 ▲
17-19 metres (56-62ft)	£353 ▲	£230 ▲	£440 ▲	£423 ▼
20-23 metres (65-70ft)	£498 ▲	£400 ▲	£550 ▲	£585 ▲
24-26 metres (80-86ft)	£588 ▲	£550 —	£600 —	£681 ▲
Over 27 metres	£1,217 ▲	£1,100 ▲	£1,300 ▲	£1,433 ▼

Straight telescopic booms

Platform Height	Average (£)	Lowest	Highest	Ideal
Up to 17 metres (40-46ft)	£253 —	£250 ▲	£265 ▼	£310 ▼
20-23 metres (60-70ft)	£373 ▲	£320 ▲	£420 ▲	£465 ▲
24-26 metres (80-86ft)	£598 ▲	£550 ▲	£650 ▲	£663 ▲
27-29 metres (88-95ft)	£1,333 ▲	£950 —	£1,825 ▲	£2,567 ▼
30-36 metres (100-120ft)	£1,887 ND	£1,250 ND	£2,800 ND	£3,650 ND
37-49 metres (120-160ft)	£1,624 ND	£1,450 ND	£1,750 ND	£3,022 ND
Over 49 metres (over 160ft)	£1,975 ND	£1,750 ND	£2,200 ND	£3,500 ND



Vehicle mounted lifts

Platform Height	Utilisation	
	2022	trend
Up to 15 metres	89%	▲
Over 15 metres	72%	▲

Truck mounted lifts

Platform Height	Utilisation	
	2022	trend
Up to 25m (3.5t) no operator	71%	▼
22-35m (7.5t) with operator	88%	▲
36-45m with operator	95%	▲
46-60m with operator	90%	▲
61-70m with operator	79%	▲
Over 70m with operator	73%	▲

UTILISATION AND PERCENTAGE OF INITIAL COST

Push around scissor lifts

Platform Height	Utilisation	
	2022	trend
Push Around Lifts (Pop Ups etc)	52%	▼
Portable Push Around (AWP/UL)	60%	▼

Trailer lifts

Platform Height	Utilisation	
	2022	trend
112-16 metres (30-47ft)	61%	▲
17-19 metres (49-55ft)	64%	▲
Over 20 metres (65ft)	66%	▲

Mast booms

Platform Height	Utilisation	
	2022	trend
8 metres	68%	▲
10 metres	69%	▲
12 metres	83%	▼

Spider lifts

Platform Height	Utilisation	
	2022	trend
Up to 15 metres	72%	▲
16-20 metres	75%	▲
21-26 metres	72%	▲
27-30 metres	80%	▲
31-35 metres	68%	▲
Over 35 metres	80%	▲

Diesel bi-energy scissor lifts

Platform Height	Utilisation	
	2022	trend
8 metres (26ft)	76%	▲
9-10 metres (30-33ft)	70%	—
11-12.5 metres (36-42ft)	79%	▲
13-17 metres (42-55ft)	73%	▲
18-22 metres (60-72ft)	63%	▼
23-25 metres (75-82ft)	69%	▼
26-30 metres (86-100ft)	71%	ND
Over 22 metres (72ft)	74%	ND

ELECTRIC power

The **Snorkel SR626E** is the electric version of the SR626 rough terrain telehandler – an industry first. Its full-time 4-wheel drive is powered by lithium-ion batteries for long-lasting durable performance. Built compact, the SR626E is highly maneuverable with reduced noise and zero emissions that is suitable for indoor use.

100%
ZERO
EMISSIONS

93%
SERVICE COST
REDUCTION

62%
NOISE
REDUCTION

4x4
ELECTRIC FAMILY
FROM 19' - 53'9"

2-IN-1
WORK INDOORS
AND OUTDOORS



SR626E
CLEAN ENDURANCE



 **snorkel**[™]
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Electric self-propelled scissor lifts

Platform Height	Utilisation	
	2022	trend
Up to 5 metres	66%	▼
6 metres (19/20ft)	77%	▼
8 metres (26ft)	70%	—
9-10 metres (30-33ft)	69%	—
11-12 metres (36-39ft)	67%	▼
13-17 metres (42-55ft)	59%	▼
18-22 metres (60-72ft)	59%	▼
23-25 metres (75-82ft)	74%	▲
26-30 metres (86-100ft)	72%	ND
Over 30 metres (over 100ft)	81%	ND

Electric self-propelled booms

Platform Height	Utilisation	
	2022	trend
Up to 11 metres (ind.)	80%	▲
10-12 metres (32-40ft) (Nifty/AB38)	72%	▲
14-16 metres (45-53ft)	74%	▲
Over 16 metres (over 54ft)	66%	ND

RT articulated booms

Platform Height	Utilisation	
	2022	trend
12-14 metres (39-45ft)	82%	▲
15-16 metres (49-52ft)	72%	▼
17-19 metres (56-62ft)	79%	▲
20-23 metres (65-70ft)	77%	▲
24-26 metres (80-86ft)	68%	▼
Over 27 metres	65%	—

Straight telescopic booms

Platform Height	Utilisation	
	2022	trend
Up to 17 metres (40-46ft)	55%	—
20-23 metres (60-70ft)	52%	—
24-26 metres (80-86ft)	71%	▲
27-29 metres (88-95ft)	76%	▲
30-36 metres (100-120ft)	70%	ND
37-49 metres (120-160ft)	74%	ND
Over 49 metres (over 160ft)	69%	ND



ACCESS RESPONDENT'S COMMENTS

Our rental rates have remained the same but our transport costs have increased over the last year.

Rates would need to increase by 25 to 30% to allow for the increases in overheads in the past 12-18 months. But this is very hard to do in a flooded market.

As machinery prices increase, returns remain static, if not reduce. 2023 will see casualties. The Crane Hire business is showing signs of distress and the general hire business and especially the Access Hire will see the same. There are too many over-gearred businesses chasing uneconomic returns. I know of transport firms being placed on notice to repossess machinery for funders.

Rates in the UK are too low and many companies are hiring at a loss. This has to change!

Hire rates have increased 15% to cover the change from red to white diesel however the true cost is nearer 20% due to the increased price of fuel generally. The company has had to change direction to stay profitable and has become much more regional. Utilisation is high at 85% however margins are down at 7%. Before covid we traded at a utilisation of 70% with a margin of 10-12% so as you can see things have got a lot more challenging however we have a positive outlook going forward.

Still too many people putting machines out cheap and supporting brokers.

We have seen more and more machines coming into Ireland but I see machines sitting in yards and the big companies are putting out machines for silly money - like a 45ft boom for €175 a week! It is possible to get that for a day if you are smart about it.

More pressure from construction customers on rates due to increasing costs and less margins. Larger rental companies are still willing to reduce rental rates to increase utilisation. New machine costs are increasing at a far higher rate than rental rates, on average machine purchase costs have gone up by 11% over the past 12 months, which inevitably reflects in average fleet age increasing. The next 18 months will be challenging for highly financed rental companies. Should there be a downturn in the market, we will see a "get them out for any rate mentality" return.

Some cowboys are supplying machines cheap and destroying a great business where the larger companies are helping to increase rates and are firm on what their rates are.



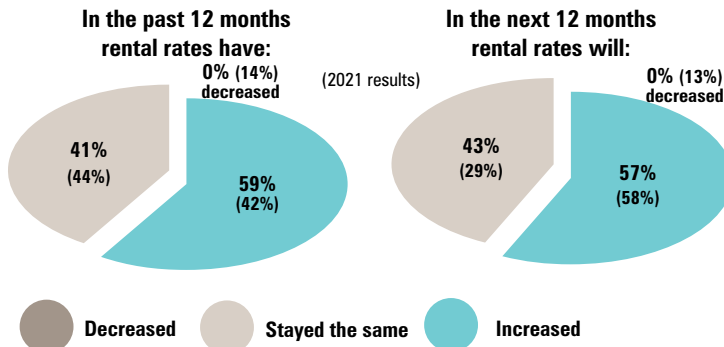
Rates are far too low and in no way represent a fair return on the investment and knowledge required to operate.

Hire rates need to increase, the cost of the assets have risen dramatically and the return on investment needs to increase therefore hire rates must go up.

Still see some daft rates going about you just need to hold your nerve for example some companies are getting £150 for a 19ft scissor while others give them away for £45!

TELESCOPIC HANDLER RENTAL RATES

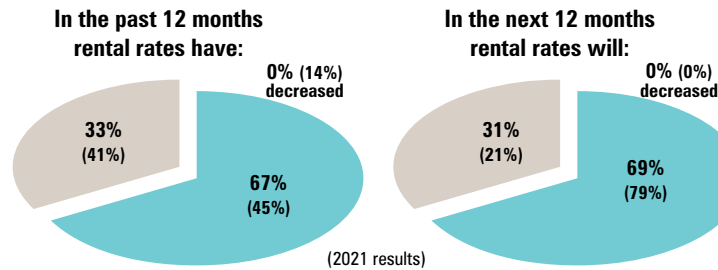
Rate trends



Judging from our respondents' comments, the telehandler rental market is generally positive although that depends on the sector and possibly the region. For some, business is good and looks set to get better in 2023. For others increasing costs are not being matched by improved rental rates and that in some categories too many companies are competing for the same work, which is never good and generally results in driving rates down, which can then lead to

market consolidation. The survey reveals however that in spite of this almost 60% of our respondents saw rates rise in 2022, while the remainder said rates stayed the same. No one reported a fall in rates as many had predicted in the previous year's survey. Predictions for 2023 are once again positive with 57% thinking rates will improve further and the rest believing that they will remain much the same - good news, but not if costs continue to increase.

Fleet size

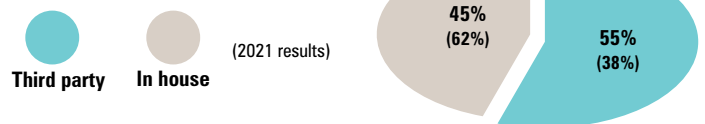


Despite mixed predictions last year two thirds of companies say that they increased their fleet size in 2022, with none reporting fleet reductions. This positivity continues with almost 70% saying fleet sizes

will continue to grow, while the rest expect them to remain static - a reflection of the amount of construction activity in the region, particularly in the UK. No one predicts fleet sizes to fall.



Who does your LOLER Thorough Examinations?



Figures for 2022 have reverted to 2020 levels with the majority of companies saying that they carry out their own LOLER Thorough inspections in house. This reverses last year's figures in which 62% used Third Party inspections and may be related to the fact that we had more respondents this year and the fact that scheduling third party inspections can be a challenge in some areas.

Would you recommend the access industry to your children?



A very positive response this year with 89% saying they would recommend the equipment rental business to their children which is unusual for telehandler respondents and possibly a product of higher rates and positive noises from governments regarding construction and house building? Or simply that we have a wider range of respondents this year?

Average fleet age in years

Average	Lowest	Highest
4.7 (2)	1.6 (1.2)	10 (3.1)

The figures suggest that the Average Fleet Age has increased substantially from two years 12 months ago, to five years in 2022, the highest input was mind blowing 10 years compared to just over three years in 2021. Obtaining new equipment over the past year or two has been a challenge due to long lead times, but a jump of this magnitude is probably a statistical anomaly based on new respondents.

Percentage of units going out with work platform attachments:

From last year rates have gone
 ▲ up ▼ down — same

Type	Average	Lowest	Highest
Fixed frame	3% ▲	0% —	15% ▲
360 degree	27% ▲	0% —	80% ▲

We have often expressed surprise - or not - at the low percentage of attachments for fixed frame telehandlers given how frequently we see them used with makeshift access platforms. However, the 27% average and 80% highest for 360 degree machines is far more 'realistic' than we have seen in previous years and reflects the wider sample size for the survey.



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LEVEL

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- 17.4 m  MAXIMUM WORKING OUTREACH
- 340 kg*  MAXIMUM CAPACITY

*Restricted weight has an impact on working envelope/reach dimensions



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What other products do you provide?

Cranes	Access	General equipment	Tools	Others
20% (6%)	27% (49%)	60% (59%)	13% (29%)	6% (24%)

(2021 results)

From the latest figures it would suggest that far more rental companies are offering cranes than in previous years - possibly glass handling/small pick and carry cranes? - coupled with a switch away from powered access equipment. Another sign of a wider sample, but also the fact that more crane companies are looking at big telehandlers for some jobs.

WEEKLY RENTAL RATES FOR TELEHANDLERS

From last year rates have gone
 ▲ up ▼ down — same

Fixed frame

Lift height	Average (£)	Lowest	Highest	Ideal
Up to 5 metres	334 ▲	219 ▲	557 ▲	379 ▲
5-7 metres	337 ▲	225 ▲	591 ▲	396 ▲
8-10 metres	365 ▲	235 ▲	607 ▲	437 ▲
11-13 metres	354 ▼	245 ▼	500 ▲	406 ▲
14-15 metres	418 ▼	285 ▼	627 ▲	506 ▲
16-18 metres	505 ▼	365 ▲	757 ▲	586 ▲
Over 18 metres	683 ▲	550 ▼	973 ▲	774 ▼

360 degree

Lift height	Average (£)	Lowest	Highest	Ideal
Up to 20 metres	953 ▼	900 ▼	1,100 ▼	1,350 ▼
20-25 metres	1,353 ▼	1,200 ▲	1,650 ▲	1,783 ▼
Over 25 metres	1,642 ▲	1,450 ▲	1,750 ▼	1,821 ▼

Heavy Duty

Lift height	Average (£)	Lowest	Highest	Ideal
Lift Height	Average	Lowest	Highest	Ideal
6-8 tonne	180	180	300	491
9-12 tonne	1076	950	1250	1600
Over 12 tonne	ND	ND	ND	ND

UTILISATION AND PERCENTAGE ON INITIAL COST

Fixed frame

Lift height	Utilisation		
	Average	Lowest	Highest
Up to 5 metres	77%	65%	88%
5-7 metres	81%	70%	90%
8-10 metres	79%	65%	91%
11-13 metres	76%	60%	86%
14-15 metres	77%	65%	80%
16-18 metres	84%	80%	90%
Over 18 metres	79%	70%	82%

360 degree

Lift height	Utilisation		
	Average	Lowest	Highest
Up to 20 metres	67%	60%	80%
20-25 metres	76%	70%	82%
Over 25 metres	74%	67%	81%

Heavy Duty

Lift height	Utilisation		
	Average	Lowest	Highest
6-7 tonne	70%	65%	77%
8-9 tonne	82%	70%	90%

Respondent's comments

Costs are increasing which will force hire rates to rise. Hire companies can only absorb so much.

This is the worst return on investment area with all the manufacturers stating that the value is in the residual.

We are seeing some demand for electric machines but trying to get the rate needed is not easy people like the idea of clean and quiet but do not expect to pay for it.

Business is good and looks like getting better in 2023.

The cost of new equipment as well as operational costs continue to outpace anything we can do with rates.

Too many companies competing for the same work which drives down the rates.

The decision we have taken to move towards a greater focus on more niche machines like sub compacts and more recently rotos does seem to be paying off. I am interested in dipping my toe into the electric market but the premium and industry's penchant for price cutting is holding me back - just look at the high capacity market.

